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Foodservice Numbers

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A Statistical Digest for the Foodservice Industry

National Restaurant Association
Research and Information Services Department
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Introduction

The National Restaurant Association has prepared this publication in response to numerous inquiries from members of the foodservice industry, its suppliers and investors who seek reliable information on industry sales, consumer eating out behavior and attitudes, industry operating data and economic statistics. This report enhances NRA's commitment to provide accurate and extensive information on the industry and its customers. The Association publishes estimates of industry sales and purchases of food and beverages annually in July and forecasts are prepared and issued separately in December. In addition, the Association through its research program publishes information on consumer eating out behavior and attitudes as well as industry operating statistics.

This publication brings together NRA's information on foodservice industry sales, purchases and number of units for the period 1970 through 1984. Where necessary, data previously appearing in our annual foodservice industry study, published in the "Foodservice Trends" section of *NRA News* and in the 1981 *Foodservice Sales Panorama,* have been updated and revised so that we have a comparable time series. In addition, extensive information on many other aspects of the industry—customers, employees, wage rates and benefits—are included. The report consists of six major sections:

SECTION I: Industry Food and Beverage Sales and Purchases
SECTION II: Consumer Research Highlights
SECTION III: Characteristics of the Restaurant Occasion
SECTION IV: Restaurant Operations
SECTION V: Industry Trends
SECTION VI: Major Economic Indicators

The information presented in Section II provides highlights on consumer attitudes and behavior based on research studies conducted by the National Restaurant Association. Readers will find information on:

Frequency of eating away from home
Where people eat out
How consumers make the decision to dine away from home
What consumers expect when they eat out
Consumer nutrition concerns
Take out occasions
Preferences for ethnic food
Preferences for restaurant concepts

As mentioned, only highlights from these studies are presented here. For those interested in more detailed information, all publications cited in this section are available for sale from the National Restaurant Association.

Sections III and IV provide additional information on restaurant occasions and on restaurant operations. Readers will find statistics on customer traffic, average check size, use of promotions, food items ordered and ratings of restaurant service, food quality and cleanliness. In addition, statistics on operating ratios, executive compensation and benefits for hourly employees and executives can be found in this all-encompassing publication. Readers who have need for more in-depth information on these subjects may contact the National Restaurant Association's Information Service for assistance.

Sections V and VI provide detailed information for 1970 through 1984 on such things as consumer prices, wholesale food prices, franchise restaurants, sales by state and region, disposable personal income and personal consumption expenditures. The information has been compiled by the Research and Information Service Department from various government agencies such as the Bureau of Labor Statistics, the Bureau of the Census and the Bureau of Economic Analysis.

The National Restaurant Association believes that readers will find this publication, *Foodservice Numbers: A Statistical Digest of the Foodservice Industry,* to be a valuable and useful research source on the industry, its customers and its operating environment.

Section I

Industry Food and Beverage Sales and Purchases

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Executive Overview

Foodservice Industry Sales

Food and beverage sales for the industry increased fourfold between 1970 and 1984, rising from $42.8 billion to $165.0 billion.

Lower food, labor and energy costs in the 1980 to 1984 period resulted in lower menu price inflation—average yearly gains of 5.7 percent versus considerably higher annual increases of 8.3 percent between 1970 and 1980. This has, in turn, resulted in a slowdown in the overall rate of sales growth for the industry.

Sales advanced at a compound annual rate of 8.4 percent between 1980 and 1984 versus a higher annual rate of 11.2 percent between 1975 and 1980.

Sales advanced by a 2.0 percent average annual rate in real terms (constant dollars) between 1980 and 1984 versus 2.5 percent between 1975 and 1980.

During the fifteen-year period real sales (adjusted for inflation) declined in two years—0.2 percent in 1974 and 0.1 percent in 1980.

Food and drink purchases for the foodservice industry reached $66.9 billion in 1984, up from $52.0 billion in 1980, $31.4 billion in 1975 and $17.6 billion in 1970.

Commercial Foodservice Group Sales

Commercial Foodservice Group sales account for nearly 87 percent of total industry sales and equalled $143.3 billion in 1984, up from $34.8 billion in 1970.

Food and drink sales (unadjusted for inflation) rose at a compound annual rate of 9.0 percent between 1980 and 1984 versus a higher 11.7 percent yearly gain between 1975 and 1980 when menu prices were advancing at a faster pace.

Real sales (adjusted for inflation) advanced at an average annual pace of 2.5 percent between 1980 and 1984 compared to annual gains of 3.0 percent between 1975 and 1980.

Real sales experiencd a modest decline in two years—0.1 percent in 1974 and 0.5 percent in 1980.

Eating Place Sales

Eating places account for the largest segment within the Commercial Foodservice Group.

Total sales equalled $104.5 billion in 1984, nearly five times greater than 1970 sales of $21.6 billion.

In current dollar terms, sales increased 9.7 percent per year between 1980 and 1984 versus a lower industry average of 8.4 percent.

Real sales for Eating Places increased at a considerably faster pace between 1980 and 1984 than did real sales for the larger Commercial Foodservice Group—3.0 percent versus 2.5 percent on an average annual basis.

Real sales for Eating Places experienced only one year of negative growth. In 1980, inflation adjusted sales dropped 0.4 percent.

Limited Menu Restaurants

Limited Menu Restaurants include most fast food operations and are establishments which usually do not offer waiter/waitress service.

Sales grew sevenfold between 1970 and 1984—rising from a mere $6.2 billion in 1970 to $43.7 billion in 1984.

In current dollar terms, sales advanced at a healthy average yearly gain of 11.1 percent between 1980 and 1984. However, this is below the yearly increases of 16.1 percent experienced during the 1975 to 1980 period.

Real sales for these quick service outlets averaged an impressive 4.5 percent per year between 1980 and 1984 and an even better 7.6 percent between 1975 and 1980.

Restaurants and Lunchrooms

Restaurants and Lunchrooms, which include those establishments which offer waiter/waitress service, represent the industry's largest sector in terms of total dollar sales.

Sales have risen substantially during the fifteen-year period—from $13.3 billion in 1970 to $55.1 billion in 1984.

Sales, in current dollar terms, have increased at an average annual pace of 8.8 percent between 1980 and 1984 and 11.6 percent between 1975 and 1980.

Real sales have advanced at an average yearly rate of 2.4 percent during the 1980 to 1984 period.

Other Commercial Segments

Foodservice sales at grocery stores, which also include convenience stores, have risen dramatically. In 1984, food and drink sales at such establishments totalled $2.0 billion dollars up from only $188 million in 1970.

Foodservice sales at gasoline service stations which incorporate a snack bar or quick service food store rose from a mere $109 million in 1970 to $1.0 billion in 1984.

Food and drink sales at miscellaneous retailers which include liquor stores and book stores have advanced substantially—rising from $82 million in 1970 to $423 million in 1984.

Hotel restaurants have also experienced considerable gains during this fifteen-year period. Total foodservice sales increased from $1.6 billion in 1970 to $8.1 billion in 1984.

Institutional Foodservice Group Sales

Foodservice sales for the Institutional Foodservice Group have risen from $7.4 billion in 1970 to $20.9 billion in 1984.

This group has experienced a decline in the populations it serves. As a result, sales gains have been modest in recent years. The group has recorded compound annual sales increases of only 4.5 percent between 1980 and 1984 versus 6.9 percent between 1975 and 1980 and 9.1 percent between 1970 and 1975.

However, some segments have performed well. These include foodservice on passenger and cargo liners, foodservice at clubs and foodservice at private colleges and universities.

With the exception of the recession years of 1974 and 1980, when wholesale food costs were high and inflation was rising rapidly, sales growth for the Commercial Foodservice Group has outpaced gains for the Institutional Foodservice Group.

Alcoholic Beverage Sales

Sales have nearly tripled between 1970 and 1984, rising from $7.6 billion to $20.5 billion.

Restaurants and Lunchrooms now account for the largest proportion of alcoholic beverage sales—39.7 percent in 1984 up from 25.0 percent in 1970.

Bars and Taverns account for 35.2 percent of alcoholic beverage sales, down substantially from 57.2 percent in 1970.

Consumers are spending a growing proportion of their food dollar away from home—25 percent in 1955, 29.2 percent in 1967, 33.6 percent in 1972, 37.4 percent in 1977, 38.2 percent in 1982 and 40.5 percent in 1984. However, the proportion did drop to 36.0 percent in 1980 when consumers, faced with high prices for housing, food and energy, cut back on eating out expenditures.

Foodservice Industry Sales 1970–1984

	Commercial (000)	Institutional (000)	Military (000)	Total (000)
1970	$ 34,829,136	$ 7,369,764	$580,650	$ 42,779,550
1971	$ 37,685,625	$ 7,795,529	$588,596	$ 46,069,750
1972	$ 41,062,230	$ 8,257,498	$610,752	$ 49,930,480
1973	$ 46,450,093	$ 9,286,231	$585,359	$ 56,321,683
1974	$ 51,883,729	$10,472,678	$510,506	$ 62,866,913
1975	$ 58,392,138	$11,378,117	$543,000	$ 70,313,255
1976	$ 65,635,167	$12,170,540	$574,003	$ 78,379,710
1977	$ 73,139,924	$13,121,523	$572,241	$ 86,833,688
1978	$ 82,672,592	$14,318,156	$624,414	$ 97,615,162
1979	$ 93,104,904	$15,916,641	$554,876	$109,576,421
1980	$101,529,072	$17,475,319	$612,331	$119,616,722
1981	$112,058,040	$18,676,663	$664,343	$131,399,046
1982	$119,991,881	$19,731,038	$714,160	$140,437,079
1983	$131,265,769	$20,089,178	$766,522	$152,121,469
1984	$143,265,420	$20,861,063	$826,557	$164,953,040

Foodservice Industry Food and Drink Sales Annual Percent Change 1971–1984 (current dollars)

Foodservice Industry	Percent Change	Commercial Feeding	Percent Change	Institutional Feeding	Percent Change
1971	7.7%	1971	8.2%	1971	5.8%
1972	8.4%	1972	9.0%	1972	5.9%
1973	12.8%	1973	13.1%	1973	12.5%
1974	11.6%	1974	11.7%	1974	12.8%
1975	11.8%	1975	12.5%	1975	8.6%
1976	11.5%	1976	12.4%	1976	7.0%
1977	10.8%	1977	11.4%	1977	7.8%
1978	12.4%	1978	13.0%	1978	9.1%
1979	12.2%	1979	12.6%	1979	11.2%
1980	9.2%	1980	9.0%	1980	9.8%
1981	9.8%	1981	10.4%	1981	6.9%
1982	6.9%	1982	7.1%	1982	5.6%
1983	8.3%	1983	9.4%	1983	1.8%
1984	8.4%	1984	9.1%	1984	3.8%

Foodservice Industry Comparative Growth Triangles
Foodservice Industry Sales

	Sales (000)	1970	1971	1972	1973	1974	1975
1970	$ 42,779,550	—					
1971	$ 46,069,750	7.7%					
1972	$ 49,930,480	16.7%	8.4%				
1973	$ 56,321,683	31.6%	22.2%	12.8%			
1974	$ 62,866,913	46.9%	36.5%	25.9%	11.6%		
1975	$ 70,313,255	64.4%	52.6%	40.8%	24.8%	11.8%	
1976	$ 78,379,710	83.1%	70.1%	56.9%	39.1%	24.6%	11.5%
1977	$ 86,833,688	103.0%	88.5%	73.9%	54.2%	38.1%	23.5%
1978	$ 97,615,162	128.2%	111.9%	95.5%	73.3%	55.3%	38.8%
1979	$109,576,421	156.1%	137.8%	119.5%	94.5%	74.3%	55.8%
1980	$119,616,722	179.6%	159.6%	139.6%	112.4%	90.3%	70.1%
1981	$131,399,046	207.1%	185.2%	163.2%	133.3%	109.0%	86.9%
1982	$140,437,079	228.3%	204.8%	181.3%	149.3%	123.4%	99.7%
1983	$152,121,469	255.6%	230.2%	204.7%	170.1%	142.0%	116.3%
1984	$164,953,040	285.6%	258.0%	230.4%	192.9%	162.4%	134.6%

How To Use Growth Triangles: The growth triangle gives percent change in sales between any two points from 1970 through 1984. For instance, if you are interested in finding out how much foodservice industry sales have risen from 1975 to 1981, select the 1975 column from the horizontal axis and follow that column down until you reach 1981 on the vertical axis — 86.9%. These figures are not compound growth rates which can be found on pages 10 through 17.

Foodservice Industry Comparative Growth Triangles
Commercial Group Sales

	Sales (000)	1970	1971	1972	1973	1974	1975
1970	$ 34,829,136						
1971	$ 37,685,625	8.2%					
1972	$ 41,062,230	17.9%	9.0%				
1973	$ 46,450,093	33.4%	23.2%	13.1%			
1974	$ 51,883,729	49.0%	37.7%	26.3%	11.7%		
1975	$ 58,392,138	67.6%	54.9%	42.2%	25.7%	12.5%	
1976	$ 65,635,167	88.4%	74.1%	59.8%	44.3%	26.5%	12.4%
1977	$ 73,139,924	110.0%	94.1%	78.1%	57.5%	41.1%	25.3%
1978	$ 82,672,592	137.4%	119.4%	101.3%	78.0%	59.3%	41.6%
1979	$ 93,104,904	167.3%	147.1%	126.7%	100.4%	79.4%	59.4%
1980	$101,529,072	191.5%	169.4%	147.3%	118.6%	95.7%	73.9%
1981	$112,058,040	221.7%	197.3%	172.9%	141.2%	116.0%	91.9%
1982	$119,991,881	244.5%	218.4%	192.2%	158.3%	131.3%	105.5%
1983	$131,266,769	276.9%	248.3%	219.7%	182.6%	153.0%	124.8%
1984	$143,266,420	311.3%	280.2%	248.9%	208.4%	176.1%	145.3%

See footnote

1976	1977	1978	1979	1980	1981	1982	1983
10.8%							
24.6%	12.4%						
39.8%	26.2%	12.2%					
52.7%	37.7%	22.5%	9.2%				
67.7%	51.3%	34.6%	19.9%	9.8%			
79.2%	61.7%	43.9%	28.2%	17.4%	6.9%		
94.2%	75.2%	55.8%	38.8%	27.2%	16.8%	8.3%	
110.5%	90.0%	69.0%	50.5%	37.9%	25.5%	17.6%	8.4%

1976	1977	1978	1979	1980	1981	1982	1983
11.4%							
26.0%	13.0%						
41.9%	27.3%	12.6%					
54.8%	38.8%	22.8%	9.0%				
70.8%	53.2%	35.5%	20.4%	10.4%			
82.9%	64.1%	45.1%	28.9%	18.2%	7.1%		
100.0%	79.5%	58.8%	41.0%	29.3%	17.1%	9.4%	
118.4%	95.9%	73.3%	53.9%	41.1%	27.8%	19.4%	9.1%

Foodservice Industry Comparative Growth Triangles
Institutional Group Sales

	Sales (000)	1970	1971	1972	1973	1974	1975
1970	$ 7,369,764						
1971	$ 7,795,529	5.8%					
1972	$ 8,257,498	12.0%	5.9%				
1973	$ 9,286,231	26.0%	19.1%	12.5%			
1974	$10,472,678	42.1%	34.3%	26.8%	12.8%		
1975	$11,378,117	54.4%	46.0%	37.8%	22.5%	8.6%	
1976	$12,170,540	65.1%	56.1%	47.4%	31.1%	16.2%	7.0%
1977	$13,121,523	78.0%	68.3%	58.9%	41.3%	25.3%	15.3%
1978	$14,318,156	94.3%	83.7%	73.4%	54.2%	36.7%	25.8%
1979	$15,916,641	116.0%	104.2%	92.7%	71.4%	52.0%	39.9%
1980	$17,475,319	137.1%	124.2%	111.6%	88.2%	66.9%	53.6%
1981	$18,676,663	153.4%	140.0%	126.2%	101.1%	78.3%	64.1%
1982	$19,731,038	167.7%	153.1%	138.9%	112.5%	88.4%	73.4%
1983	$20,089,176	172.6%	157.7%	143.3%	116.3%	91.8%	76.6%
1984	$20,861,063	183.1%	167.6%	152.6%	124.6%	99.2%	83.3%

See footnote

1976	1977	1978	1979	1980	1981	1982	1983
7.8%							
17.6%	9.1%						
30.8%	21.3%	11.2%					
43.6%	33.2%	22.0%	9.8%				
53.5%	42.3%	30.4%	17.3%	6.9%			
62.1%	50.4%	37.8%	24.0%	12.9%	5.6%		
65.1%	53.1%	40.3%	26.2%	15.0%	7.6%	1.8%	
71.4%	59.0%	45.7%	31.1%	19.4%	11.7%	5.7%	3.8%

Foodservice Industry Sales, 1971–1984
Annual Percent Change (constant dollars)

Year	Total Foodservice Industry	Commercial Foodservice	Eating Places	Restaurants and Lunchrooms	Limited Menu Restaurants	Commercial Cafeterias	Social Caterers	Ice Cream, Frozen Custard Stands*	Institutional Foodservice
1971	3.0%	3.1%	3.9%	2.0%	8.2%	3.4%	2.3%	3.7%	2.4%
1972	4.4	5.2	6.5	4.7	10.8	4.6	4.4	5.4	1.2
1973	5.1	6.1	7.7	6.2	13.1	−1.1	−4.0	9.5	0.5
1974	−0.2	−0.1	1.6	0.7	5.2	−8.5	−9.9	8.2	−0.2
1975	3.0	3.2	5.9	4.6	10.2	−4.6	−5.8	12.5	2.0
1976	5.0	5.9	7.9	5.5	13.6	−3.8	−4.9	17.1	1.7
1977	4.2	4.7	6.0	3.2	11.3	−4.4	−6.3	18.3	1.4
1978	3.2	3.8	5.4	5.5	5.9	0.0	−0.4	3.4	0.0
1979	1.6	1.8	2.8	1.8	5.1	−1.5	0.0	−10.0	1.7
1980	−0.1	−0.5	−0.4	−0.1	1.0	−1.7	−1.2	−12.3	2.0
1981	1.2	1.5	2.1	1.8	3.2	0.9	1.1	−10.5	0.5
1982	1.6	1.8	2.6	1.3	4.8	0.1	1.7	1.1	0.4
1983	4.1	5.0	5.5	4.4	7.3	3.3	3.1	5.1	−0.8
1984	4.0	4.8	5.4	4.7	6.5	4.2	3.8	5.1	−1.1

* Refer to "Notes Concerning Foodservice Industry Figures" on page 30 for explanation of fluctuations in sales for Ice Cream and Frozen Custard Stands.

Proportion of Food Dollar Spent Away From Home

Year	Proportion
1955	25.0%
1967	29.2%
1972	33.6%
1977	37.4%
1979	37.0%
1980	36.0%
1982	38.2%
1984	40.5%

Sources: U.S. Department of Agriculture; National Restaurant Association

Foodservice Industry Sales Distribution,* 1984

Total Foodservice Industry, 1984	
Commercial Foodservice	86.8%
Institutional Foodservice	12.6%
Commercial Foodservice, 1984	
Eating Places	73.0%
Bars and Taverns	5.8%
Lodging Places	7.0%
Food Contractors	6.2%
Other	8.0%
Institutional Foodservice, 1984	
Hospitals and Nursing Homes	49.7%
Educational Foodservice	27.6%
Employee Foodservice	9.1%
Other	13.6%

* Military Foodservice, which accounts for less than one percent of total sales, has been excluded.

Table I-1
Foodservice Industry Food and Drink Sales, 1970–1984
(current dollars)

	1970 (000)	1971 (000)	1972 (000)	1973 (000)	1974 (000)	1975 (000)	1976 (000)	1977 (000)
Group I—Commercial Foodservice								
Eating Places								
Restaurants, Lunchrooms	$13,347,668	$14,300,462	$15,513,535	$17,616,084	$19,894,901	$22,676,208	$25,421,163	$28,045,126
Limited Menu Restaurants	6,189,514	7,010,864	8,006,563	9,683,644	11,364,919	13,596,739	16,345,885	19,358,064
Commercial Cafeterias	1,255,365	1,382,323	1,480,124	1,573,342	1,632,027	1,710,153	1,758,208	1,805,400
Social Caterers	530,193	589,268	615,891	636,596	661,237	674,681	686,440	691,870
Ice Cream, Frozen Custard Stands	291,038	316,533	345,625	403,992	486,285	592,781	733,265	919,856
TOTAL EATING PLACES	$21,613,778	$23,559,450	$25,991,728	$29,913,658	$34,029,369	$39,250,562	$44,944,961	$50,820,316
Bars and Taverns	5,007,962	5,199,266	5,333,407	5,535,355	5,729,369	5,988,107	6,233,021	6,443,622
TOTAL EATING AND DRINKING PLACES	$26,621,740	$28,758,716	$31,325,136	$35,449,013	$39,758,738	$45,238,669	$51,177,982	$57,263,938
Food Contractors								
Manufacturing and Industrial Plants	$ 915,000	$ 924,607	$ 982,218	$ 1,213,304	$ 1,366,007	$ 1,350,981	$ 1,450,683	$ 1,609,817
Commercial and Office Buildings	200,000	211,751	224,218	273,856	319,227	351,788	379,368	421,995
Hospitals and Nursing Homes	249,887	288,006	336,175	399,852	487,433	531,741	565,293	615,717
Colleges and Universities	496,161	538,930	514,064	577,345	657,654	711,647	755,783	822,745
Primary and Secondary Schools	108,871	311,820	369,445	362,853	393,532	430,524	448,177	482,371
In-transit Feeding (Airlines)	181,551	197,785	212,383	239,342	250,617	267,985	301,041	341,069
Recreation and Sports Centers	290,965	317,559	365,193	408,774	459,728	524,550	603,967	695,045
TOTAL FOOD CONTRACTORS	$ 2,442,435	$ 2,790,452	$ 3,002,696	$ 3,475,326	$ 3,934,198	$ 4,169,216	$ 4,504,312	$ 4,988,759
Lodging Places								
Hotel Restaurants	$ 1,554,448	$ 1,593,309	$ 1,727,625	$ 1,968,801	$ 2,216,770	$ 2,538,202	$ 2,923,555	$ 3,267,735
Motor Hotel Restaurants	387,351	401,296	435,848	474,167	501,648	547,898	594,567	629,184
Motel Restaurants	642,849	720,955	835,731	915,020	943,244	1,006,535	1,077,328	1,133,350
TOTAL LODGING PLACES	$ 2,584,648	$ 2,715,560	$ 2,999,204	$ 3,357,988	$ 3,661,662	$ 4,092,635	$ 4,595,450	$ 5,030,269
Retail Hosts								
Drug and Proprietary Store Restaurants	$ 340,789	$ 350,604	$ 370,659	$ 378,443	$ 366,711	$ 340,674	$ 322,959	$ 316,343
General Merchandise Store Restaurants	24,396	26,487	28,643	31,344	33,475	35,658	38,996	42,745
Department Store Restaurants	423,590	468,914	510,835	579,287	637,476	712,819	790,326	759,836
Variety Store Restaurants	389,494	436,818	486,135	525,026	478,824	405,085	369,842	347,970
Food Stores, except Grocery	93,806	101,939	107,056	114,121	116,632	115,349	116,848	116,853
Grocery Store Restaurants	188,828	199,799	220,618	248,041	289,712	342,729	408,190	468,447

1978 (000)	1979 (000)	1980 (000)	1981 (000)	1982 (000)	1983 (000)	1984 (000)	Compound Annual Percent Change 1970–75	1975–80	1980–84
$32,173,745	$36,227,637	$39,306,986	$43,526,746	$46,443,038	$ 50,530,025	$ 55,111,582	11.2%	11.6%	8.8%
22,285,003	25,901,859	28,699,260	32,201,572	35,357,326	39,494,133	43,719,215	17.1	16.1	11.1
1,971,497	2,162,732	2,340,076	2,571,744	2,711,686	2,920,486	3,165,807	6.4	6.5	7.9
752,754	835,557	906,579	998,143	1,067,746	1,147,827	1,240,801	4.9	6.1	8.2
1,035,758	1,048,187	1,023,030	1,007,685	1,072,369	1,174,244	1,283,449	15.3	11.5	5.8
$58,218,757	$66,175,972	$72,275,931	$80,305,890	$86,652,165	$ 95,266,715	$104,520,854	12.7%	13.0%	9.7%
6,701,367	7,183,865	7,785,083	8,026,420	7,911,779	8,157,044	8,254,928	3.7	5.4	1.5
$64,920,124	$73,359,837	$80,061,014	$88,332,310	$94,563,944	$103,423,759	$112,775,782	11.2%	12.1%	8.9%
$ 1,794,624	$ 2,016,619	$ 2,121,483	$ 2,299,688	$ 2,258,294	$ 2,393,792	$ 2,616,415	8.1%	9.4%	5.4%
476,770	541,134	603,906	669,127	709,943	763,189	825,007	12.0	11.4	8.1
678,151	751,334	832,480	902,408	989,038	1,033,545	1,105,892	16.3	9.4	7.3
895,969	1,004,381	1,139,972	1,271,069	1,407,073	1,494,312	1,612,363	7.5	9.9	9.0
526,749	576,790	628,966	657,108	719,533	762,183	833,066	31.6	7.8	7.3
395,872	476,067	512,914	532,190	548,688	618,920	672,431	8.1	13.9	7.0
780,883	875,370	977,788	1,011,926	1,075,677	1,175,715	1,241,555	12.5	13.3	6.2
$ 5,549,018	$ 6,241,695	$ 6,817,509	$ 7,343,516	$ 7,708,246	$ 8,241,656	$ 8,906,729	11.3%	10.4%	6.9%
$ 3,771,620	$ 4,382,622	$ 4,963,704	$ 5,775,481	$ 6,411,043	$ 7,302,020	$ 8,109,689	10.3%	14.4%	13.1%
680,777	668,705	653,324	669,003	679,223	703,675	726,193	7.2	3.6	2.7
1,224,714	1,192,871	1,151,120	1,185,654	1,196,064	1,158,986	1,190,279	9.4	2.7	0.8
$ 5,677,111	$ 6,244,198	$ 6,768,148	$ 7,630,138	$ 8,286,330	$ 9,164,681	$ 10,026,161	9.6%	10.6%	8.2%
$ 337,854	$ 357,450	$ 369,961	$ 390,309	$ 396,608	$ 416,042	$ 428,939	−0.1%	1.7%	3.8%
46,425	50,232	52,643	55,222	56,768	60,117	62,942	7.9	8.1	4.6
815,304	841,394	857,380	913,651	942,888	1,006,061	1,060,388	11.0	3.8	5.5
326,744	303,218	281,386	271,577	255,554	247,632	236,488	0.8	−8.0	−4.3
125,617	137,676	149,103	157,602	161,846	170,424	179,968	4.2	5.3	4.8
560,263	691,364	830,328	1,032,098	1,257,180	1,553,874	1,954,774	12.7	19.4	24.0

Table continues

Table I-1
Foodservice Industry Food and Drink Sales, 1970–1984
(current dollars)

	1970 (000)	1971 (000)	1972 (000)	1973 (000)	1974 (000)	1975 (000)	1976 (000)	1977 (000)
Gasoline Service Stations	109,223	115,962	125,761	141,481	166,382	201,821	247,029	296,873
Miscellaneous Retailers (Liquor, Cigar, etc.)[2]	82,322	88,249	92,697	99,093	102,462	104,921	108,384	145,820
TOTAL RETAIL HOSTS	$ 1,652,448	$ 1,788,772	$ 1,942,404	$ 2,116,836	$ 2,191,674	$ 2,259,056	$ 2,402,574	$ 2,494,887
Recreation and Sports								
Drive-in Movies	$ 61,741	$ 64,504	$ 68,032	$ 74,177	$ 88,358	$ 98,634	$ 107,097	$ 128,197
Bowling Lanes	241,294	255,289	276,989	303,580	333,331	370,332	412,178	453,784
Recreation and Sports Centers	210,765	229,937	254,007	294,699	338,010	393,477	448,249	511,676
TOTAL RECREATION AND SPORTS	$ 513,800	$ 549,730	$ 599,028	$ 672,456	$ 759,699	$ 862,443	$ 967,524	$ 1,093,657
All Other								
Vending and Non-Store Retailers[3]	$ 853,070	$ 905,107	$ 990,006	$ 1,145,437	$ 1,321,834	$ 1,501,604	$ 1,692,308	$ 1,935,004
Mobile Caterers	160,995	177,288	203,757	233,037	255,924	268,515	295,017	333,410
TOTAL ALL OTHER	$ 1,014,065	$ 1,082,395	$ 1,193,763	$ 1,378,474	$ 1,577,758	$ 1,770,119	$ 1,987,325	$ 2,268,414
TOTAL GROUP I	$34,829,136	$37,685,625	$41,062,230	$46,450,093	$51,883,729	$58,392,138	$65,635,167	$73,139,924
GROUP II—Institutional Foodservice—Business, Educational, Government or Institutional Organizations That Operate Their Own Foodservice								
Employee Foodservice								
Industrial and Commercial Organizations	$ 560,806	$ 566,685	$ 608,761	$ 751,984	$ 855,633	$ 891,570	$ 955,050	$1,053,134
Sea-Going Ships (1,000+ tons)	44,841	39,582	38,034	41,730	47,288	41,655	43,866	45,710
Inland Waterway Vessels	82,230	85,976	89,661	109,740	131,440	138,880	133,909	146,452
TOTAL EMPLOYEE FOODSERVICE	$ 687,877	$ 692,243	$ 736,456	$ 903,454	$1,034,361	$1,072,105	$1,132,825	$1,245,296
Educational Foodservice								
Public and Parochial Elementary and Secondary Schools (National School Lunch Program)	$1,163,329	$1,322,419	$1,340,849	$1,400,879	$1,561,803	$1,686,782	$1,734,482	$1,793,269
Public Colleges and Universities	654,996	745,639	760,034	859,408	974,225	1,080,922	1,133,325	1,214,471
Private Colleges and Universities	283,526	305,914	308,702	344,540	386,574	415,818	450,069	493,906
TOTAL EDUCATIONAL FOODSERVICE	$2,101,851	$2,373,972	$2,409,585	$2,604,827	$2,922,602	$3,183,522	$3,317,876	$3,501,646

1978 (000)	1979 (000)	1980 (000)	1981 (000)	1982 (000)	1983 (000)	1984 (000)	Compound Annual Percent Change 1970–75	1975–80	1980–84
347,044	418,882	491,767	597,989	711,541	860,253	1,047,788	13.1	19.5	21.0
165,214	197,926	230,980	278,331	325,997	375,548	423,242	5.0	17.1	16.3
$ 2,724,465	$ 2,998,142	$ 3,263,548	$ 3,696,779	$ 4,108,382	$ 4,689,951	$ 5,394,529	6.5%	7.6%	13.4%
$ 146,875	$ 161,871	$ 167,213	$ 187,446	$ 216,313	$ 232,104	$ 244,870	9.9%	11.1%	10.0%
501,431	548,566	583,126	624,528	645,774	677,417	702,481	8.9	9.5	4.8
569,649	632,310	701,768	756,803	797,372	912,093	958,610	13.3	12.3	8.1
$ 1,217,955	$ 1,342,747	$ 1,452,107	$ 1,567,777	$ 1,659,459	$ 1,821,614	$ 1,905,961	10.9%	11.0%	7.0%
$ 2,198,164	$ 2,483,925	$ 2,700,026	$ 2,991,630	$ 3,165,167	$ 3,386,729	$ 3,667,828	12.0%	12.5%	8.0%
385,755	434,360	466,720	495,890	500,353	537,379	588,430	10.8	11.7	6.0
$ 2,583,919	$ 2,918,285	$ 3,166,746	$ 3,487,520	$ 3,666,520	$ 3,924,108	$ 4,256,258	11.8%	12.3%	6.1%
$82,672,592	$93,104,904	$101,529,072	$112,058,040	$119,991,881	$131,265,769	$143,265,420	10.9%	11.7%	9.0%
$1,166,662	$1,301,995	$1,376,668	$1,489,555	$ 1,458,274	$ 1,504,939	$ 1,629,649	9.7%	9.1%	4.3%
47,957	52,003	55,919	53,927	49,775	46,191	43,604	−1.5	6.1	−3.0
158,850	181,296	202,649	218,192	225,174	215,492	230,576	11.0	7.9	3.3
$1,373,469	$1,535,294	$1,635,236	$1,761,674	$ 1,733,223	$ 1,766,622	$ 1,904,029	9.3%	8.8%	3.9%
$1,938,524	$2,136,253	$2,312,195	$2,364,450	$ 2,464,112	$ 2,577,461	$ 2,780,429	7.7%	6.5%	4.7%
1,310,242	1,440,101	1,625,118	1,789,255	1,961,023	2,049,269	2,047,220	10.6	8.5	5.9
541,815	599,247	672,954	746,306	822,429	882,055	921,747	8.0	10.1	8.2
$3,790,581	$4,175,601	$4,610,267	$4,900,011	$ 5,247,564	$ 5,508,785	$ 5,749,396	8.7%	7.7%	5.7%

Table continues

Table I-1
Foodservice Industry Food and Drink Sales, 1970–1984
(current dollars)

	1970 (000)	1971 (000)	1972 (000)	1973 (000)	1974 (000)	1975 (000)	1976 (000)	1977 (000)
Transportation Foodservice								
Passenger Cargo Lines	$ 40,648	$ 45,902	$ 43,842	$ 52,801	$ 65,340	$ 64,157	$ 71,650	$ 79,029
Airlines	177,954	193,868	207,457	233,797	244,821	260,468	284,744	316,162
Railroads	20,741	16,127	15,434	19,217	22,154	22,806	22,512	26,444
TOTAL TRANSPORTATION FOODSERVICE	$ 239,343	$ 255,897	$ 266,733	$ 305,815	$ 332,315	$ 347,431	$ 378,906	$ 421,635
Health Care Foodservice								
Voluntary and Proprietary Hospitals	$1,806,798	$1,863,742	$2,031,455	$2,268,542	$2,650,360	$2,940,680	$3,223,485	$3,507,795
State and Local Short-term Hospitals[a]	304,935	336,650	353,933	398,631	426,152	454,763	481,640	526,040
Long-term General, TB, Nervous and Mental Hospitals	761,825	690,107	701,528	726,492	774,797	746,542	733,707	743,938
Federal Hospitals	116,204	126,529	140,228	159,785	181,626	203,679	215,354	234,284
TOTAL HOSPITAL FOODSERVICE	$2,990,762	$3,019,028	$3,227,144	$3,553,450	$4,032,935	$4,345,664	$4,654,186	$5,012,057
Nursing Homes, Homes for Aged, Blind, Orphans, Mentally and Physically Handicapped[b]	$ 704,349	$ 789,927	$ 912,524	$1,136,442	$1,287,828	$1,457,821	$1,638,299	$1,787,712
TOTAL HEALTH CARE FOODSERVICE	$3,695,111	$3,808,955	$4,139,668	$4,689,892	$5,320,763	$5,803,485	$6,292,485	$6,799,769
Miscellaneous Foodservice								
Clubs	$ 524,944	$ 531,709	$ 556,619	$ 602,262	$ 639,316	$ 696,462	$ 737,929	$ 800,727
Sporting and Recreation Camps	45,880	46,706	48,528	60,230	73,320	78,892	85,769	94,620
Community Centers	74,758	86,047	99,909	119,751	150,001	196,220	224,750	257,830
Convents and Seminaries[c]	—	—	—	—	—	—	—	—
TOTAL MISCELLANEOUS FOODSERVICE	$ 645,582	$ 664,462	$ 705,056	$ 782,243	$ 862,637	$ 971,574	$ 1,048,448	$ 1,153,177
Penal Institutions Foodservice								
Federal and State Prisons[c]	—	—	—	—	—	—	—	—
Jails	—	—	—	—	—	—	—	—
TOTAL PENAL INSTITUTIONS FOODSERVICE	—	—	—	—	—	—	—	—
TOTAL GROUP II	$ 7,369,764	$ 7,795,529	$ 8,257,498	$ 9,286,231	$10,472,678	$11,378,117	$12,170,540	$13,121,523
TOTAL GROUPS I AND II	$42,198,900	$45,481,154	$49,319,728	$55,736,324	$62,356,407	$69,770,255	$77,805,707	$86,261,447

1978 (000)	1979 (000)	1980 (000)	1981 (000)	1982 (000)	1983 (000)	1984 (000)	Compound Annual Percent Change 1970–75	1975–80	1980–84
$ 88,832	$ 103,614	$ 115,684	$ 123,182	$ 133,651	$ 153,164	$ 172,769	9.5%	12.5%	10.6%
366,976	441,334	475,494	493,662	504,574	571,622	624,783	7.9	12.8	7.1
25,109	31,631	32,755	30,698	31,358	35,157	41,087	1.9	7.5	5.8
$ 480,917	$ 576,579	$ 623,933	$ 647,142	$ 669,583	$ 759,943	$ 838,639	7.7%	12.4%	7.7%
$3,838,080	$4,290,565	$4,771,098	$5,190,252	$ 5,527,620	$ 5,344,325	$ 5,357,862	10.2%	10.2%	2.9%
583,546	656,099	723,645	771,166	844,507	793,128	788,491	8.4	9.8	2.2
752,040	820,153	884,510	872,010	887,548	871,542	864,800	0.4	2.7	nc
262,944	288,657	318,995	349,283	381,711	366,057	390,173	11.5	9.4	5.2
$5,436,620	$6,055,464	$6,668,248	$7,182,753	$ 7,641,436	$ 7,375,052	$ 7,391,326	9.4%	8.9%	2.1%
$1,990,080	$2,205,805	$2,416,239	$2,549,132	$ 2,704,629	$ 2,793,879	$ 2,986,657	15.7%	10.6%	5.4%
$7,426,700	$8,261,269	$9,084,487	$9,731,885	$10,346,065	$10,168,931	$10,377,983	9.4%	9.4%	3.3%
$ 860,301	$ 941,944	$1,055,919	$1,163,622	$ 1,275,330	$ 1,391,385	$ 1,466,520	5.8%	8.7%	8.6%
99,824	107,231	114,244	115,828	115,290	119,284	123,698	11.4	7.7	2.0
286,364	318,723	351,233	356,501	344,023	374,228	400,798	21.0	12.3	3.4
—	—	—	—	—	—	—	—	—	—
$ 1,246,489	$ 1,367,898	$ 1,521,396	$ 1,635,951	$ 1,734,603	$ 1,884,897	$ 1,991,016	8.5%	9.4%	7.0%
—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—
$14,318,156	$ 15,916,641	$ 17,475,319	$ 18,676,663	$ 19,731,038	$ 20,089,178	$ 20,861,063	9.1%	9.0%	4.5%
$96,990,748	$109,021,545	$119,004,391	$130,734,703	$139,722,919	$151,354,947	$164,126,483	10.6%	11.3%	8.4%

Table continues

Table I-1
Foodservice Industry Food and Drink Sales, 1970–1984
(current dollars)

	1970 (000)	1971 (000)	1972 (000)	1973 (000)	1974 (000)	1975 (000)	1976 (000)	1977 (000)
GROUP III Military Foodservice								
Defense Forecrews							—	—
Officers and NCO Clubs								
1 Open Mess[1]	$ 415,256	$ 422,299	$ 449,436	$ 419,294	$ 441,640	$ 352,400	$ 370,992	371,072
Military Exchange								
Foodservice	186,395	166,297	161,476	132,500	179,866	190,600	203,011	201,169
TOTAL GROUP III	$ 580,660	$ 588,596	$ 610,752	$ 588,359	$ 510,506	$ 543,000	$ 574,003	$ 572,241
GRAND TOTAL	$42,779,500	$46,060,750	$50,606,480	$56,421,865	$62,666,913[7]	$70,313,295	$78,379,710	$86,833,688

Footnotes

Data are given only for establishments with APR payroll.

Includes SIC 581 except 5812 and 5813.

Includes sales of hot food, carryout food, gasoline, coffee and soda via vending.

Represents only sales to customers; excludes employee meals.

Sales (Commercial equivalent) estimated for Nursing Homes and Retail Gift Shops in the group (none in Group IV Food served either in cash or charge).

These establishments have no charge for food served either to staff or patients.

Estimated U.S. total.

1978 (000)	1979 (000)	1980 (000)	1981 (000)	1982 (000)	1983 (000)	1984 (000)	Compound Annual Percent Change 1970–75	1975–80	1980–84
$ 403,414	$ 459,565	$ 392,507	$ 436,047	$ 471,867	$ 506,248	$ 546,242	-3.3%	2.2%	8.6%
221,900	195,327	219,800	228,290	242,693	260,274	280,315	2.9%	2.9%	6.3%
$ 625,414	$ 654,916	$ 612,331	$ 664,343	$ 714,160	$ 766,522	$ 826,557	-1.3%	2.4%	7.8%
$97,615,162	$109,576,421	$119,616,722	$131,369,048	$140,427,079	$152,121,463	$164,953,040	10.4%	11.2%	8.4%

Table I-2
Foodservice Industry Food and Drink Purchases, 1970–1984
(current dollars)

	1970 (000)	1971 (000)	1972 (000)	1973 (000)	1974 (000)	1975 (000)	1976 (000)	1977 (000)
GROUP I—Commercial Foodservice								
Eating Places								
Restaurants, Lunchrooms	$4,811,516	$5,286,711	$5,894,511	$ 7,243,547	$ 8,019,962	$ 9,154,951	$10,094,998	$11,006,591
Limited Menu Restaurants	1,972,511	2,120,346	2,304,190	2,558,666	3,032,164	4,876,617	5,879,124	6,962,515
Commercial Cafeterias	434,665	471,036	525,503	596,766	612,191	642,836	666,906	684,806
Social Caterers	230,587	233,736	252,180	263,341	268,451	271,226	278,659	281,065
Ice Cream, Frozen Custard								
Stands	89,587	95,161	114,634	133,176	166,432	206,542	243,303	294,344
TOTAL EATING PLACES	$7,538,867	$8,207,990	$9,220,993	$10,645,250	$12,099,200	$15,152,056	$17,163,190	$19,229,321
Bars and Taverns	258,890	284,615	297,415	282,365	310,000	316,334	355,282	394,156
TOTAL EATING AND								
DRINKING PLACES	$7,797,757	$8,492,605	$9,518,408	$10,927,615	$12,409,200	$15,468,390	$17,524,472	$19,623,477
Food Contractors								
Manufacturing and Industrial								
Plants	$ 571,561	$ 623,880	$ 672,612	$ 780,586	$ 911,024	$ 624,553	$ 676,015	$ 750,175
Commercial and Office								
Buildings	79,000	79,870	88,477	108,085	124,436	163,411	176,766	196,650
Hospital and Nursing Homes	91,401	97,000	148,000	159,431	189,076	212,696	225,137	246,286
Colleges and Universities	175,000	190,000	192,000	204,000	232,400	251,923	267,540	291,252
Primary and Secondary Schools	164,000	178,000	181,000	190,000	193,000	206,347	210,643	226,714
Religious Meeting Places	91,000	93,000	97,000	113,000	120,000	126,632	144,500	163,713
Recreation and Sports Centers	80,000	81,000	83,962	88,000	95,000	187,083	223,466	257,167
TOTAL FOOD								
CONTRACTORS	$ 961,174	$1,140,750	$1,263,054	$1,443,102	$1,664,936	$1,772,645	$1,925,072	$2,131,957
Lodging Places								
Hotels Restaurants	$ 880,506	$ 926,886	$1,061,912	$1,254,372	$1,449,278	$ 806,512	$ 980,472	$1,098,547
Motor Hotel Restaurants	151,400	158,837	182,943	192,631	180,214	177,102	200,966	211,714
Motor Restaurants	317,339	352,040	371,800	422,800	335,775	365,769	391,490	411,848
TOTAL LODGING PLACES	$1,349,245	$1,437,763	$1,616,655	$1,869,803	$1,965,267	$1,349,383	$1,572,928	$1,722,109
Retail Hosts								
Drug and Proprietary Store								
Restaurants	$ 119,278	$ 142,211	$ 161,569	$ 140,620	$ 117,524	$ 120,406	$ 122,721	$ 120,207
General Merchandise Store								
Restaurants	8,033	9,220	10,186	12,597	12,720	13,650	14,818	16,243
Department Store								
Restaurants	196,724	213,400	231,560	225,322	254,984	289,136	316,122	303,934
Variety Store Restaurants	136,429	152,882	175,184	193,508	186,741	167,083	144,235	135,701
Food Stores or Grocery								
Restaurants	30,267	32,811	35,415	39,942	40,700	39,219	39,728	39,729

1978 (000)	1979 (000)	1980 (000)	1981 (000)	1982 (000)	1983 (000)	1984 (000)	Compound Annual Percent Change 1970–75	1975–80	1980–84
$12,532,961	$13,824,466	$14,758,594	$16,156,256	$16,842,103	$17,895,208	$19,022,589	13.1%	10.1%	7.4%
8,080,319	9,393,309	10,295,860	11,261,856	12,195,095	13,428,035	14,960,572	21.0	16.1	9.8
747,749	826,346	929,736	962,938	994,131	1,051,375	1,144,434	8.3	7.5	5.3
304,752	329,368	353,439	383,716	402,656	422,366	458,848	7.3	5.0	6.8
331,442	335,420	322,264	312,362	323,855	463,447	388,885	18.9	9.8	4.8
$21,997,223	$24,702,909	$26,659,893	$29,077,158	$30,757,842	$33,160,401	$36,566,328	15.0%	12.0%	8.2%
409,990	450,644	491,939	485,117	415,289	418,048	417,906	5.9	8.0	4.0
$22,407,213	$25,153,553	$27,151,822	$29,562,267	$31,173,131	$33,568,449	$36,983,234	14.8%	11.0%	8.0%
$ 836,295	$ 939,744	$ 986,590	$ 1,060,156	$ 1,027,624	$ 1,077,206	$ 1,177,387	10.9%	9.4%	4.5%
222,175	252,168	281,414	208,468	323,024	343,439	371,263	18.9	11.4	7.2
271,260	300,634	332,992	360,362	396,615	413,476	442,357	16.3	9.4	7.4
317,173	365,641	396,713	438,977	460,800	478,748	516,569	7.5	9.6	6.8
247,672	262,627	305,237	302,276	294,719	302,676	323,500	25.7	8.6	1.5
190,015	226,507	246,188	265,435	263,348	297,093	322,733	9.5	14.9	7.0
288,927	323,887	356,916	363,281	377,563	405,622	430,820	16.1	12.9	4.9
$ 2,373,417	$ 2,683,008	$ 2,907,049	$ 3,086,956	$ 3,132,995	$ 3,318,156	$ 3,664,619	13.1%	10.3%	5.4%
$ 1,317,080	$ 1,532,680	$ 1,700,615	$ 1,912,088	$ 2,067,590	$ 2,339,596	$ 2,686,859	11.4%	14.7%	11.1%
237,135	233,692	224,103	221,966	220,200	226,688	233,308	2.0	1.7	1.0
446,036	423,863	404,906	407,177	400,249	382,952	392,268	8.0	2.1	(1.0)
$ 1,999,221	$ 2,190,245	$ 2,329,624	$ 2,541,220	$ 2,688,039	$ 2,949,236	$ 3,312,435	10.1%	10.4%	8.4%
$ 128,381	$ 135,831	$ 140,581	$ 146,553	$ 145,556	$ 149,776	$ 156,276	7.7%	1.7%	2.5%
17,641	19,088	19,478	20,156	20,266	21,101	22,218	9.7	1.5	3.3
326,122	336,558	334,378	361,746	354,516	367,202	380,162	12.3	3.2	3.9
127,427	118,252	106,927	101,839	93,788	89,145	85,609	3.0	(7.5)	(2.5)
42,708	46,808	50,694	52,796	52,600	54,706	58,130	5.3	5.4	3.5

Table continues

Table I-2
Foodservice Industry Food and Drink Purchases, 1970–1984
(current dollars)

	1970 (000)	1971 (000)	1972 (000)	1973 (000)	1974 (000)	1975 (000)	1976 (000)	1977 (000)
Grocery Store Restaurants	66,090	69,930	77,214	91,775	107,190	126,806	151,030	173,321
Gasoline Service Station Foodservice	38,228	40,588	44,645	52,346	61,561	74,672	91,398	109,840
Miscellaneous Retailers (Liquor, Cigar, etc.) Foodservice	28,812	30,697	32,443	36,166	37,398	38,295	39,560	53,223
TOTAL RETAIL HOSTS	$ 584,293	$ 612,675	$ 666,027	$ 797,275	$ 833,884	$ 865,116	$ 919,612	$ 952,198
Recreation and Sports								
Drive-in Movies	$ 19,753	$ 20,641	$ 21,770	$ 24,478	$ 29,168	$ 32,549	$ 35,342	$ 42,305
Bowling Lanes	93,043	94,427	106,918	122,960	136,662	155,539	168,989	186,047
Recreation and Sports Centers	67,443	73,978	81,282	100,198	118,304	145,586	165,852	189,320
TOTAL RECREATION AND SPORTS	$ 180,243	$ 192,996	$ 209,970	$ 247,626	$ 284,124	$ 333,674	$ 370,183	$ 417,672
All Other								
Vending and Non-Store Retailers	$ 272,974	$ 299,509	$ 316,792	$ 389,367	$ 449,410	$ 510,545	$ 575,368	$ 657,896
Mobile Caterers	53,728	58,428	67,240	81,563	89,573	93,980	103,256	116,694
TOTAL ALL OTHER	$ 326,702	$ 348,130	$ 384,032	$ 470,930	$ 538,983	$ 604,525	$ 678,624	$ 774,590
TOTAL GROUP I	$10,696,427	$11,613,061	$13,042,064	$15,931,921	$17,946,281	$20,464,285	$22,989,991	$25,622,003
GROUP II—Institutional Foodservice—Business, Educational, Government or Institutional Organizations That Operate Their Own Foodservice								
Employee Foodservice								
Industrial and Commercial Organizations	$ 280,403	$ 293,343	$ 304,381	$ 375,992	$ 427,816	$ 445,356	$ 467,065	$ 515,033
Sea-Going Ships (1,000 + tons)	26,969	23,749	22,820	26,038	28,337	24,993	26,320	27,426
Inland Waterway Vessels	49,338	51,586	53,797	65,644	78,864	83,327	81,348	88,968
TOTAL EMPLOYEE FOODSERVICE	$ 356,646	$ 368,678	$ 380,998	$ 466,674	$ 535,017	$ 553,676	$ 574,733	$ 631,427
Educational Foodservice								
Public and Parochial Elementary and Secondary Schools (National School Lunch Program)	$1,369,276	$1,456,277	$1,571,032	$1,704,181	$1,961,944	$2,227,932	$2,337,845	$2,468,480
Public Colleges and Universities	372,611	425,670	433,888	490,610	556,146	617,044	646,947	693,256
Private Colleges and Universities	163,674	174,830	176,423	196,901	220,919	237,627	257,196	282,243
TOTAL EDUCATIONAL FOODSERVICE	$1,905,361	$2,056,777	$2,181,343	$2,391,692	$2,739,009	$3,082,603	$3,241,988	$3,443,979

1978 (000)	1979 (000)	1980 (000)	1981 (000)	1982 (000)	1983 (000)	1984 (000)	Compound Annual Percent Change 1970–75	1975–80	1980–84
207,297	256,798	298,910	366,395	434,984	532,963	674,399	13.9	18.7	22.0
128,406	154,982	177,031	212,280	246,186	295,058	361,487	14.3	18.9	19.5
60,301	72,243	81,996	97,413	111,162	126,935	143,902	8.9	16.5	15.1
$ 1,038,283	$ 1,139,560	$ 1,209,996	$ 1,349,177	$ 1,459,057	$ 1,635,885	$ 1,890,181	8.2%	7.0%	11.8%
$ 48,469	$ 53,417	$ 55,180	$ 60,920	$ 68,138	$ 71,962	$ 76,154	10.5%	11.1%	8.4%
205,587	208,456	218,672	231,069	235,701	242,515	252,893	10.8	7.1	3.7
210,770	233,965	255,443	271,333	279,878	314,672	332,638	16.6	11.9	6.8
$ 464,826	$ 495,827	$ 529,295	$ 563,322	$ 583,717	$ 629,139	$ 661,686	13.1%	9.7%	4.6%
$ 747,354	$ 844,510	$ 961,782	$ 994,246	$ 1,026,514	$ 1,083,753	$ 1,181,041	13.2%	12.0%	7.0%
135,014	152,026	160,085	168,107	167,116	177,335	196,359	12.1	11.2	5.1
$ 882,368	$ 996,536	$ 1,061,867	$ 1,162,353	$ 1,192,632	$ 1,261,088	1,376,400	13.1%	11.9%	6.7%
$29,165,328	$32,658,729	$35,189,852	$38,254,696	$40,229,165	$43,362,953	$47,708,614	13.9%	11.5%	7.9%
$ 570,544	$ 636,715	$ 673,272	$ 722,434	$ 692,680	$ 699,797	$ 762,769	9.7%	8.6%	3.2%
28,774	31,202	23,561	32,356	29,865	27,715	26,162	(1.5)	6.1	(6.0)
96,498	108,778	121,589	130,915	135,104	129,295	138,345	11.1	7.9	3.3
$ 695,816	$ 776,695	$ 828,372	$ 885,705	$ 857,649	$ 856,807	$ 927,276	9.2%	8.4%	2.7%
$2,675,905	$2,906,866	$3,117,110	$3,018,427	$2,814,564	$2,853,958	$3,010,355	10.2%	7.0%	(1.0%)
642,163	705,808	782,388	818,378	840,474	878,276	877,398	10.6%	4.9%	2.9%
309,620	342,434	377,910	394,538	402,823	432,022	451,462	7.8	9.7	4.6
$3,627,688	$3,955,128	$4,277,408	$4,231,343	$4,057,851	$4,164,256	$4,339,215	10.1%	6.8%	0.4%

Table continues

Table I-2
Foodservice Industry Food and Drink Purchases, 1970–1984
(current dollars)

	1970 (000)	1971 (000)	1972 (000)	1973 (000)	1974 (000)	1975 (000)	1976 (000)	1977 (000)
Transportation Foodservice								
Passenger/Cargo Liners	$ 20,324	$ 22,961	$ 21,521	$ 29,041	$ 35,937	$ 35,286	$ 39,407	$ 43,466
Airlines	80,980	87,241	104,899	118,105	123,674	131,578	141,838	157,487
Railroads	9,333	7,297	7,032	9,560	11,329	15,022	14,828	17,418
TOTAL TRANSPORTATION FOODSERVICE	$ 109,237	$ 117,499	$ 133,820	$ 156,706	$ 170,940	$ 181,886	$ 196,073	$ 218,371
Health Care Foodservice								
Voluntary and Proprietary Hospitals	$ 722,709	$ 849,497	$ 912,582	$ 997,416	$1,060,144	$1,176,272	$1,289,394	$1,403,118
State and Local Short-term Hospitals	203,162	210,162	227,623	265,222	297,856	328,373	346,789	373,488
Long-term General, TB, Nervous and Mental Hospitals	304,780	276,042	280,671	290,697	269,919	298,617	293,482	297,575
Federal Hospitals	193,264	109,132	118,408	132,361	165,520	180,189	190,229	200,755
TOTAL HOSPITAL FOODSERVICE	$1,423,875	$1,338,753	$1,449,224	$1,686,396	$1,833,439	$1,983,451	2,119,894	$2,274,936
Nursing Home, Homes for Aged, Blind, Orphans, Mentally and Physically Handicapped	$ 368,892	$ 630,627	$ 622,069	$ 720,882	$ 827,121	$ 936,302	$1,052,214	$1,148,176
TOTAL HEALTH CARE FOODSERVICE	$1,842,767	$1,883,287	$2,071,293	$2,325,278	$2,660,560	$2,919,753	$3,172,108	$3,423,112
Miscellaneous Foodservice								
Clubs	$ 218,426	$ 221,239	$ 231,604	$ 270,114	$ 307,824	$ 335,339	$ 355,298	$ 385,526
Sporting and Recreation Camps	27,528	28,024	29,117	36,138	43,992	47,335	51,461	56,772
Community Centers	68,389	70,020	85,986	141,300	176,994	237,533	265,198	304,235
Convents and Seminaries	70,767	72,041	75,967	87,742	101,430	105,791	109,123	113,942
TOTAL MISCELLANEOUS FOODSERVICE	$ 376,030	$ 391,324	$ 422,630	$ 535,294	$ 630,240	$ 719,998	$ 781,080	$ 860,475
Penal Institutions Foodservice								
Federal and State Prisons	$ 70,491	$ 71,904	$ 76,370	$ 89,354	$ 110,478	$ 134,951	$ 156,976	$ 178,717
Jails	61,651	67,886	66,792	78,254	92,348	110,956	126,612	141,772
TOTAL PENAL INSTITUTIONS FOODSERVICE	$ 132,142	$ 134,790	$ 143,162	$ 167,608	$ 202,826	$ 245,907	$ 283,588	$ 320,489
TOTAL GROUP II	$ 4,721,683	$ 4,942,299	$ 6,333,249	$ 6,043,452	$ 6,938,592	$ 7,703,823	$ 8,249,570	$ 8,897,853
TOTAL GROUPS I AND II	$15,417,110	$16,564,360	$18,375,333	$21,975,373	$24,884,873	$28,168,108	$31,239,561	$34,519,856

1978 (000)	1979 (000)	1980 (000)	1981 (000)	1982 (000)	1983 (000)	1984 (000)	Compound Annual Percent Change 1970–75	1975–80	1980–84
$ 48,858	$ 56,986	$ 63,615	$ 67,940	$ 73,606	$ 84,240	$ 95,021	11.7%	12.5%	10.6%
182,799	219,637	236,648	248,054	267,329	284,719	311,192	10.4	12.5	7.1
17,567	21,768	25,654	32,191	18,412	18,406	18,434	10.0	11.3	(8.0)
$ 249,214	$ 298,390	$ 325,917	$ 348,185	$ 359,347	$ 387,365	$ 424,647	10.6%	12.4%	6.8%
$1,636,236	$1,716,222	$1,868,431	$2,010,000	$2,221,048	$2,331,736	$2,443,146	10.2%	10.2%	2.9%
412,722	499,808	585,253	642,540	701,895	545,456	646,821	10.1	9.0	1.5
350,876	428,081	531,468	580,661	666,053	449,671	447,920	(0.6)	2.7	nc
277,661	236,221	261,523	281,152	301,576	296,692	310,964	11.6	2.7	4.4
$2,466,330	$2,140,410	$3,007,676	$3,280,553	$3,139,477	$3,323,467	$3,111,556	6.3%	8.6%	2.5%
$1,276,700	$1,444,642	$1,627,667	$1,811,066	$1,987,023	$2,178,698	$1,834,936	13.0%	10.3%	4.7%
$3,744,485	$4,136,082	$4,544,710	$4,962,229	$5,301,147	$5,644,466	$6,168,750	9.6%	9.3%	3.3%
$ 414,200	$ 463,499	$ 506,493	$ 549,280	$ 593,088	$ 587,583	$ 614,472	9.9%	8.2%	5.4%
59,906	64,160	69,888	69,497	69,150	71,570	74,216	11.6	7.7	2.0
337,905	376,087	414,446	420,664	366,441	441,583	472,934	22.0	12.3	3.3
114,612	117,072	119,080	126,680	116,410	106,939	107,416	8.4	2.2	(2.5)
$ 926,623	$ 1,021,008	$ 1,109,496	$ 1,166,071	$ 1,145,089	$ 1,208,075	$ 1,269,042	11.9%	8.8%	1.6%
$ 205,882	$ 230,159	$ 258,340	$ 296,676	$ 335,246	$ 361,386	$ 400,740	13.9%	13.9%	11.6%
151,110	181,977	205,705	229,235	260,162	273,696	311,581	12.5	13.1	10.9
$ 366,992	$ 412,032	$ 464,043	$ 525,913	$ 595,428	$ 641,081	$ 712,321	13.2%	13.5%	11.3%
$ 9,610,716	$10,588,608	$11,540,133	$11,978,906	$12,074,248	$12,294,655	$12,839,251	10.3%	8.4%	2.7%
$38,746,046	$43,247,237	$46,729,785	$50,233,801	$52,303,413	$55,657,608	$60,547,865	12.8%	10.7%	6.7%

Table continues

Table I-2
Foodservice Industry Food and Drink Purchases, 1970–1984
(current dollars)

	1970 (000)	1971 (000)	1972 (000)	1973 (000)	1974 (000)	1975 (000)	1976 (000)	1977 (000)
Food Furnished Foodservice Employees in Groups I and II	$ 3,012,850	$ 3,091,614	$ 3,168,937	$ 3,327,970	$ 1,671,278	$ 1,850,606	$ 2,099,741	$ 2,357,316
TOTAL GROUPS I and II and FSE	$16,429,680	$17,645,674	$19,559,270	$23,303,343	$26,096,151	$30,018,714	$33,339,302	$36,877,172
GROUP III—Military Foodservice								
Defense Personnel	$ 882,700	$ 880,100	$ 825,300	$ 900,083	$ 1,042,158	$ 1,149,334	$ 1,223,418	$ 1,280,943
Officers and NCO Clubs ("Open Mess")	137,844	540,745	149,160	136,986	119,608	120,612	126,972	132,068
Foodservice—Military Exchange	66,639	69,645	70,923	72,282	78,701	83,864	89,325	88,512
TOTAL GROUP III	$ 1,196,683	$ 1,300,724	$ 1,046,083	$ 1,112,350	$ 1,234,367	$ 1,353,810	$ 1,439,715	$ 1,501,523
GRAND TOTAL	$17,626,243	$18,946,398	$20,604,353	$24,415,693	$27,790,518	$31,372,524	$34,779,017	$38,378,695

1978 (000)	1979 (000)	1980 (000)	1981 (000)	1982 (000)	1983 (000)	1984 (000)	Compound Annual Percent Change		
							1970–75	1975–80	1980–84
$ 2,711,149	$ 2,995,196	$ 3,329,160	$ 3,614,594	$ 3,623,646	$ 3,775,735	$ 4,074,018	12.8%	12.5%	5.2%
$41,457,196	$46,242,433	$50,058,949	$53,746,299	$56,926,969	$59,433,343	$64,621,883	12.8%	10.8%	6.6%
$ 1,409,037	$ 1,537,259	$ 1,664,290	$ 1,764,787	$ 1,765,884	$ 1,813,492	$ 1,945,877	3.0%	7.7%	4.0%
143,563	135,152	145,864	162,022	172,620	182,249	197,740	12.5	3.9	7.9
97,238	85,941	95,943	93,028	107,473	106,712	113,528	4.1	2.6	4.5
$ 1,649,856	$ 1,758,752	$ 1,905,587	$ 2,019,837	$ 2,040,377	$ 2,102,453	$ 2,257,145	2.5%	7.1%	4.3%
$43,107,052	$48,001,185	$51,964,536	$55,766,136	$58,967,346	$61,535,796	$66,879,028	12.2%	10.6%	6.5%

Table I-3
Foodservice Alcoholic Beverage Sales, 1970–1984

	1970 (000)	1971 (000)	1972 (000)	1973 (000)	1974 (000)
Eating Places					
Restaurants and Luncherooms	$1,895,369	$2,030,666	$2,202,923	$2,501,484	$2,825,076
Limited Menu Restaurants	146,815	166,298	190,627	232,407	278,440
Commercial Cafeterias	28,371	30,788	33,451	35,558	36,884
Social Caterers	37,114	39,849	43,112	45,835	48,192
Total Eating Places	$2,107,669	$2,267,601	$2,470,113	$2,815,284	$3,188,592
Bars and Taverns	$4,341,903	$4,507,763	$4,624,064	$4,793,617	$4,953,040
Total Eating and Drinking Places	$6,449,572	$6,775,364	$7,094,177	$7,608,901	$8,141,632
Lodging Places	$ 740,551	$ 781,212	$ 862,840	$ 970,358	$1,062,871
All Other Establishments	$ 397,000	$ 430,000	$ 470,000	$ 527,000	$ 580,000
Total	$7,587,123	$7,986,576	$8,427,017	$9,106,259	$9,784,503

1975 (000)	1976 (000)	1977 (000)	1978 (000)	1979 (000)	1980 (000)	1981 (000)	(1982) (000)	1983 (000)	1984 (000)
$ 3,220,022	$ 3,604,721	$ 3,968,385	$ 4,562,263	$ 5,125,848	$ 5,660,206	$ 6,441,958	$ 6,978,066	$ 7,579,504	$ 8,156,514
339,918	421,724	514,924	523,920	537,047	551,547	580,177	571,374	631,906	699,507
38,820	39,911	41,163	44,930	49,229	53,330	58,610	61,826	66,587	72,180
51,276	53,542	55,360	60,220	66,844	74,793	83,345	90,758	97,565	105,468
$ 3,650,036	$ 4,119,898	$ 4,579,822	$ 5,191,333	$ 5,778,968	$ 6,339,876	$ 7,144,090	$ 7,702,024	$ 8,375,562	$ 9,033,669
$ 5,182,707	$ 5,387,823	$ 5,564,841	$ 5,787,568	$ 6,204,273	$ 6,754,649	$ 6,996,149	$ 6,925,971	$ 7,140,676	$ 7,223,062
$ 8,832,743	$ 9,507,721	$10,144,663	$10,968,901	$11,983,241	$13,094,525	$14,140,239	$14,627,995	$15,516,238	$16,256,731
$ 1,193,330	$ 1,345,961	$ 1,479,706	$ 1,676,734	$ 1,716,033	$ 1,839,712	$ 2,108,348	$ 2,424,780	$ 2,524,909	$ 2,939,938
$ 650,000	$ 720,000	$ 792,243	$ 871,559	$ 911,962	$ 1,004,421	$ 1,081,034	$ 1,160,964	$ 1,268,084	$ 1,344,576
$10,676,073	$11,573,682	$12,416,612	$13,459,194	$14,611,236	$15,938,658	$17,329,621	$18,213,739	$19,309,231	$20,541,245

Table I-4
Foodservice Industry—Number of Units
1972, 1979 and 1984

	1972	1979	1984
GROUP I—Commercial Feeding			
Eating Places			
Restaurants, Lunchrooms	112,656	120,806	124,869
Limited Menu Restaurants	72,850	100,564	117,604
Commercial Cafeterias	8,162	6,906	6,079
Social Caterers	3,944	3,449	3,581
Ice Cream, Frozen Custard Stands	5,836	8,676	7,966
Total Eating Places	203,448	240,401	260,099
Bars and Taverns	44,112	38,879	32,308
Total Eating and Drinking Places	247,560	279,280	292,407
Food Contractors	5,836	7,836	9,026
Lodging Places			
Hotel Restaurants	12,862	13,695	14,968
Motor Hotel Restaurants	2,420	2,589	1,686
Motel Restaurants	11,809	13,651	9,131
Total Lodging Places	27,091	29,835	25,785
Retail Hosts			
Drug and Proprietary Store Restaurants	9,423	8,619	10,468
General Merchandise Store Restaurants	1,267	1,644	1,562
Department Store Restaurants	3,682	5,202	4,932
Variety Store Restaurants	6,898	5,111	3,651
Food Stores ex. Grocery	3,299	3,967	4,155
Grocery Store Restaurants	9,379	22,500	39,496
Gasoline Service Stations	7,738	8,232	14,693
Miscellaneous Retailers (Liquor, Cigar, etc.)	3,622	3,608	8,525
Total Retail Hosts	45,308	58,883	87,484
Recreation and Sports			
Drive-In Movies	3,364	2,882	2,789
Bowling Lanes	3,828	3,933	3,933
Recreation and Sports Centers	—	—	—
Total Recreation and Sports	7,212	6,815	6,718
All Other			
Vending and Non-Store Retailers	3,972	3,267	3,088
Mobile Caterers	—	—	—
Total All Other	3,972	3,267	3,088
TOTAL GROUP I	**336,979**	**385,916**	**424,408**

Table I-4
Foodservice Industry—Number of Units
1972, 1979 and 1984

	1972	1979	1984
GROUP II—Institutional Feeding—Business, Educational, Government or Institutional Organizations Which Operate Their Own Food Service			
Employee Feeding			
Industrial and Commercial Organizations	4,000	4,000	3,683
Sea-going Ships (1,000 + tons)	463	552	408
Inland Waterway Vessels	4,248	4,248	4,248
Total Employee Feeding	8,711	8,800	8,339
Educational Feeding			
Public and Parochial Elementary and Secondary Schools	92,341	95,738	90,812
Public Colleges and Universities	806	995	1,017
Private Colleges and Universities[1]	1,353	1,470	1,624
Total Educational Feeding	94,500	98,203	93,453
Transportation			
Passenger/Cargo Liners	153	74	57
Airlines	28	46	95
Railroads	2	2	2
Total Transportation	183	122	154
Hospital Feeding			
Voluntary and Proprietary Hospitals	4,149	4,077	4,137
State and Local Short Term Hospitals	1,801	1,846	1,622
Long-Term General, TB, Nervous and Mental Hospitals	710	704	717
Federal Hospitals	401	361	341
Total Hospital Feeding	7,061	6,988	6,817
Nursing Homes, Homes for the Aged, Blind, Orphans, Mentally and Physically Handicapped	23,463	25,130	26,169
Miscellaneous			
Clubs	10,448	10,310	10,310
Sporting and Recreational Camps	3,721	2,249	2,806
Community Centers	900	16,010	15,210
Convents and Seminaries	—	—	—
Total Miscellaneous	15,069	28,569	28,326
Penal Institutions			
Federal and State Prisons	337	620	791
Jails	4,307	3,493	3,338
Total Penal Institutions	4,644	4,113	4,129
TOTAL GROUP II	**153,631**	**171,925**	**167,387**

Data are given only for establishments with payroll. Figures are latest Census Reports or Merchandise Line detail counts or updates when reliable data are available.
[1] Includes only those establishments serving food.
[2] Individual businesses not locations.
[3] Total number of colleges and universities which have foodservice whether contracted or not.

NOTES CONCERNING NRA'S FOODSERVICE SALES FIGURES

The following explain some of the reasons NRA's foodservice industry sales data may differ from industry sales estimates made by others. Differences not discussed here may arise from differing judgments; however, the National Restaurant Association believes these data to be more reliable and to have withstood the test of time better than other estimates.

The National Restaurant Association classifies the foodservice industry into three major groupings containing 54 separate segments. While recognizing that there are many ways to define the foodservice industry, the NRA has chosen the segments and grouped them in a way that seems reasonable. The Association is aware that this is a complex industry and that there are several communities of industry participants, for some of whom a different grouping may seem preferable. The approach in this publication, therefore, is to break the elements of the foodservice industry into many fine segments so that any industry participant can recombine them into different major groups or subgroups to suit particular needs. In fact, the NRA does provide sales and purchase data for many such subgroups each year when it publishes its annual estimates in July and its forecast in December.

Readers may note that eating place sales figures presented in this section are different from those published by the Bureau of the Census in its "Current Retail Trade Reports" series. (Census makes revisions to its figures on an annual basis, with the most recent revisions released in March 1986 and affecting 1981 through 1985.) The Census information also includes contract feeders. In this report, all contract feeding appears as a separate Commercial Foodservice Group segment.

This report defines a restaurant or lunchroom as an establishment that provides waiter or waitress service. In contrast, a limited menu or refreshment place usually does not provide waiter service but rather an order is picked up by a patron at a counter or drive thru window. These definitions are consistent with the Bureau of the Census distinctions between limited menu restaurants and restaurants and lunchrooms.

A change in the manner in which the Bureau of the Census reports sales of leased departments resulted in some revisions to NRA's previously published sales for eating places, lodging places and certain retail host categories. Leased department restaurant sales are now reported in the eating place sector rather than in their host location. Census figures for 1977 and 1982 for eating places and many retail host categories reflect this. However, no such distinction was made prior to 1977, and as a result, sales figures in years prior to 1977 for lodging places and retail hosts may be somewhat overstated while those for eating places may be understated slightly. The National Restaurant Association believes that all figures presented in Table I-1 provide an accurate time series of sales for these three segments. In addition, readers should be aware that reductions to prior estimates for lodging places and retail hosts were balanced virtually dollar for dollar by increases in sales at restaurants and limited menu restaurants.

Some examples of leased departments are as follows:

- Fast food restaurants on military bases are reported in the limited menu category, not in the Military Foodservice Group.
- Sales for a restaurant leased in a hotel will show up in the restaurant category, not in lodging places.
- Fast food operations in variety stores are included with limited menu restaurants and not with variety stores.

Food and beverage sales reported on Table I-1 for ice cream and frozen custard stands show a decline from 1979 through 1981. During this period, a number of such establishments were reclassified as limited menu operations because of an expanded menu which included sandwiches and other items rather than only ice cream and frozen treats.

Other points to be borne in mind concerning our sales figures include:

- The dollar volume and number of establishment estimates refer to units with payroll only. Thus, NRA numbers may be slightly lower than other estimates which include all establishments. NRA has based its estimates for sales and number of establishments on

Bureau of the Census "Merchandise Line" information which is for establishments with payroll.

NRA's dollar volume estimates are for food and alcoholic beverage sales and exclude all other merchandise sold through eating places such as cigarettes or gifts.

NRA's foodservice sales figures for many segments such as school and health care foodservice refer to actual receipts. They do not include a commercial equivalent.

Data presented in this section are national in scope and do not show regional variations which can be substantial.

Airline data are for the United States rather than worldwide.

Tobacco and canned soft drinks are excluded from NRA's vending sales data.

Industry sales, purchases and alcoholic beverage sales and numbers of units presented in this section were prepared for the National Restaurant Association by the firm Malcolm M. Knapp, Inc.

NRA FOODSERVICE INDUSTRY—TERMS OF REFERENCE

There are many ways to define the components of the foodservice industry. We have chosen a way that seems reasonable, but we recognize that this is a complex industry and that there are several communities of industry participants.

NRA's approach breaks the elements of the foodservice industry into many segments so that industry participants can recombine the segments into different major subgroups to suit their particular needs. Groupings are to some extent arbitrary, and the categories rarely have neat, sharp boundaries.

We define the foodservice industry as encompassing all meals and snacks prepared outside the home including all take out meals and beverages in this definition.

The major foodservice groupings used by NRA in its analysis of the industry are as follows:

Commercial Foodservice (Group I): This group comprises those establishments that are open to the public, are operated for profit and may operate facilities and/or supply meal service on a regular basis for others.

Commercial foodservice accounts for over 86 percent of industry sales, and includes eating and drinking places, foodservice contractors, hotel and motel restaurants and restaurants in department stores, drugstores, etc.

Eating places: Dollar sales for eating places are those with payroll only. Thus our figures may be slightly lower than estimates that include all establishments. Our dollar volume estimates for eating places refer to restaurants and lunchrooms, commercial cafeterias, limited menu (fast food) restaurants, ice cream and frozen custard stands and social caterers. They do not include contract feeders, which are shown separately, although the Bureau of the Census data include contract feeders in their eating place category.

Institutional Foodservice (Group II): This group comprises the business, educational, government and institutional organizations that operate their own foodservice. Food is provided as auxiliary service to complement their other activities. While some establishments operate at a profit, this is not the aim of the foodservice activity. Rather, they serve food principally as a convenience for their own employees, students, patients, etc.

Military Foodservice (Group III): This group comprises the sales of food and beverages at officers' and NCO clubs and military exchanges as well as defense foodservice to the troops. This group has been shown separately because most suppliers treat it as a distinct entity for sales purposes.

Methodology

The foodservice industry sales figures in this section were based on information from trade associations, various government data (both published and unpublished), published reports and discussions with foodservice executives in many segments of the industry. Whenever possible, several approaches and sources were used for the industry segment under examination to arrive at a set of answers in close agreement with each other. This has proved particularly useful when

data are "soft." Source materials used in making these estimates are listed in this section.

For the Commercial Foodservice Group, sales figures were determined first, and then food and drink purchases were calculated from the sales figures on the basis of food and beverage costs as a percentage of sales. In the Institutional Foodservice Group, purchases were calculated from a cost per meal times the number of meals consumed in a particular segment. When a direct charge is not made, such as in a proprietary hospital, commercial equivalent sales were calculated as a multiple of food costs.

There are exceptions, however. For airlines, estimated sales were taken to mean estimated purchases from a contractor or the internal cost of foodservice operations by the airline. The sales figures do not include the cost of serving meals or beverages. When there is no charge for the serving of meals, as in federal hospitals which do not charge veterans for service, this report assumes no sales transaction occurred.

Sources for Tables 1 Through 4

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2. Industry Sources.
3. U.S. Department of Agriculture, Food and Nutrition Service; HEW, Office of Education: "Fall Statistics of Public School Pupils;" HEW *Digest of Educational Statistics*; National Catholic Education Association: *Guidley's Catholic Schools in America*; U.S. Bureau of the Census: *Current Population Reports*, Series P-20.
4. *College and University Business*, "College Operating Practices Analyses, 1970-71," December 1970; HEW *Digest of Educational Statistics*; HEW *Projections of Educational Statistics 1986*; U.S. Bureau of the Census: *Current Population Report* Series P-20, No. 245, "Living Arrangements of College Students," October 1971; HEW National Center for Educational Statistics unpublished data, 1970-1980.
5. U.S. Department of Commerce, Bureau of Economic Analysis, "Personal Consumption Expenditures," *Survey of Current Business*; Laventhol and Horwath: *Annual Country Club Studies*; Pannell, Kerr, Forester, *Clubs in Town and Country*.
6. U.S. Maritime Commission, Immigration and Naturalization Service.
7. American Waterways Operators, Inc., individual companies, Waterborne Commerce of the U.S.
8. Individual passenger lines, U.S. Maritime Commission, Immigration and Naturalization Service.
9. Air Transport Association, *Air Transport World* and *Air Transport Facts and Figures*, individual companies, CAB Form 41 and Merrill, Lynch, Pierce, Fenner and Smith air transport analysts.
10. Association of American Railroads and Amtrak Corporation.
11. American Camping Association and individual companies.
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19. "Survey of the Industry," *Vending Times*.
20. U.S. Department of Commerce, Selected Services Division, *Franchising in the Economy*.
21. U.S. Department of Labor, Bureau of Labor Statistics, *Producer Price Index* and *Consumer Price Index*.
22. Company annual reports.
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24. Laventhol and Horwath, *Lodging Industry*; Pannell, Kerr, Forester, *Trends in the Hotel Industry, U.S.A. Edition*.
25. American Hotel and Motel Association, *Construction and Modernization Report*.
26. U.S. Department of Labor, Bureau of Labor Statistics, *Employment by Industry, 1970-1984*; Nonagricultural establishments—*Employees' Hours and Earnings by Industry, 1960-1985*.
27. Department of Defense.
28. AudArena Stadium.
29. National Retail Merchants Association, *Department and Specialty Store Merchandising and Operating Results*.

Note: These are the general sources used. For more specific citations, see the published reports for each individual year in *NRA News*.

Section II

Consumer Research Highlights

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Table II-1
Breakfast: Place of Preparation

Number of Times/Week	Privately		Commercially		Skipped	
	1981	*1985*	*1981*	*1985*	*1981*	*1985*
0	18.7%	20.2%	84.8%	82.0%	73.3%	70.7%
1	2.8	2.8	6.3	7.1	2.6	2.5
2	4.7	5.6	2.9	3.6	2.9	3.3
3	2.7	3.0	1.7	2.1	2.7	2.2
4	3.6	3.5	1.0	1.0	2.2	2.5
5	4.7	4.7	1.2	1.7	3.5	4.2
6	5.6	5.6	0.4	0.3	2.3	2.4
7	58.0	52.7	1.6	2.2	10.4	12.1
At least once per week	81.3%	79.8%	15.2%	18.0%	26.7%	29.2%
Mean weekly meals	4.9	4.8	0.4	0.5	1.3	1.5

Source: Meal Consumption Behavior, National Restaurant Association, July 1981 and July 1985

Table II-1 Highlights

The percentage of people who eat breakfast at least once a week away from home increased from 15.2 percent in 1981 to 18.0 percent in 1985.

The percentage of people who eat breakfast at least once a week away from home increased from 26.7 percent in 1981 to 29.2 percent in 1985.

Table II-2
Lunch: Place of Preparation

Number of Times/Week	Privately		Commercially		Skipped	
	1981	1985	1981	1985	1981	1985
0	24.3%	22.0%	40.0%	46.3%	84.1%	82.5%
1	2.9	2.6	3.7	5.9	3.9	4.5
2	14.2	14.9	8.0	8.6	3.4	3.9
3	3.8	4.0	4.9	5.1	1.9	2.1
4	6.3	6.6	3.3	3.4	1.3	1.0
5	7.9	8.3	12.1	14.1	1.3	1.7
6	6.6	6.6	2.1	2.3	0.5	0.6
7	33.1	32.9	9.9	10.2	3.6	3.7
At least once per week	75.7%	78.0%	51.0%	53.6%	15.9%	17.5%
Mean weekly meals	3.9	3.9	2.0	2.1	0.6	0.6

Source: Meal Consumption Behavior, National Restaurant Association, July 1981 and July 1985

Table II-2 Highlights

More than half said they eat lunch at a restaurant or cafeteria at least once in a seven day period.

Nearly three out of 10 eat lunch out five or more times a week.

Table II-3
Dinner: Place of Preparation

Number of Times/Week	Privately		Commercially		Skipped	
	1981	1985	1981	1985	1981	1985
0	41.3%	43.2%	52.6%	51.2%	96.2%	94.8%
1	9.8	8.9	19.8	19.7	2.2	2.5
2	2.3	2.4	13.4	14.1	1.1	1.2
3	3.3	3.7	6.1	6.5	0.6	0.5
4	6.7	6.8	2.9	3.0	0.3	0.2
5	13.7	14.3	1.9	2.0	0.1	0.2
6	19.1	19.3	0.6	0.7	0.1	0.1
7	42.9	44.4	2.5	2.8	0.4	0.4
At least once per week	58.7%	56.8%	47.4%	48.8%	4.8%	5.1%
Mean weekly meals	5.2	5.4	1.1	1.1	0.1	0.1

Table II-4
Frequency of Eating Out in a Two Week Period*

Demographic Characteristics	Number of Times						
	0	1	2	3	4	5	6 or more
Sex							
Male	14.3%	6.1%	14.8%	8.1%	11.7%	9.6%	35.2%
Female	18.6	12.9	12.7	12.0	8.8	9.7	25.8
Female Employment							
Yes	13.0%	10.8%	11.2%	13.2%	8.0%	11.5%	29.1%
No	22.3	14.3	14.5	10.7	8.4	7.6	22.1
Household Income							
Less than $20,000	28.1%	23.5%	18.8%	7.8%	11.1%	5.5%	25.1%
$20,000-$40,000	17.5	11.4	14.8	9.0	11.8	11.8	27.0
More than $40,000	8.2	5.4	12.9	10.2	9.9	14.1	48.4
Household Composition							
Single	30.1%	12.9%	13.8%	8.9%	8.1%	10.1%	34.7%
Married, no children	16.2	9.6	10.8	11.7	11.6	8.9	22.5
Family (children)	9.5	6.6	10.1	12.1	10.9	10.2	34.2
Age							
18-24	8.3%	10.8%	10.9%	13.4%	8.9%	8.0%	32.6%
25-34	9.2	8.4	11.4	9.9	10.8	9.2	37.0
35-44	9.6	7.9	12.0	9.1	12.6	10.4	36.2
45-54	12.7	9.6	10.2	7.1	10.6	8.1	31.2
55-64	23.1	12.2	13.6	11.1	7.2	7.4	20.6
65+	34.4	10.6	12.8	5.6	10.2	6.1	17.0
Where Live							
Urban	20.5%	13.2%	8.4%	9.7%	10.7%	6.4%	22.2%
Suburban	13.2	9.0	12.4	10.7	12.0	11.4	36.7
Rural	12.7	6.2	16.3	9.2	7.1	8.1	27.9
Region							
Northeast	13.8%	8.6%	12.3%	9.1%	12.3%	7.6%	25.4%
Midwest	16.3	9.0	9.2	10.8	11.4	8.8	27.9
South	17.8	12.1	10.1	9.2	9.1	10.5	34.6
West	10.6	7.1	9.2	10.6	5.9	9.9	31.3
Total Respondents	16.5%	9.9%	12.3%	10.2%	10.1%	9.6%	30.3%

* Percent of total households.

Source: Consumer Nutrition Opinion and Behavior Study, National Restaurant Association, September 1986, conducted March 1986.

These who eat out less frequently (five average lifestyle, non-working women, lower income individuals, senior citizens and individuals living in rural areas.

Table II-5
Frequency of Eating Out at a Fast Food Place in a Two Week Period*

Demographic Characteristics	Number of Times						
	0	1	3	3	4	5	6 or more
Sex							
Male	27.9%	12.9%	17.5%	9.4%	8.4%	5.8%	17.8%
Female	35.8	12.4	16.9	12.4	6.9	5.3	10.3
Female Employment							
Yes	27.2%	12.5%	17.6%	14.0%	9.4%	4.2%	15.3%
No	46.3	12.2	15.7	10.6	4.0	6.8	4.2
Household Income							
Less than $20,000	36.6%	9.7%	13.8%	15.6%	5.9%	4.1%	11.1%
$20,000-$40,000	27.8	11.8	22.1	11.9	6.6	11.9	6.6
More than $40,000	28.1	14.7	16.9	8.6	11.9	6.6	25.0
Household Composition							
Single	30.4%	12.0%	15.4%	11.3%	6.2%	6.2%	16.6%
Married, no children	42.3	13.0	19.2	8.8	4.0	5.4	6.7
Family, children	25.0	11.2	16.5	12.1	10.0	6.2	18.8
Age							
18-24	30.1%	14.6%	19.8%	11.0%	5.8%	6.8%	12.8%
25-34	27.6	9.4	23.1	12.4	10.1	4.1	13.4
35-44	28.3	9.2	16.8	10.5	7.1	4.4	21.1
45-54	34.5	13.6	12.4	7.6	2.8	6.2	13.0
55-64	40.1	12.8	13.8	4.0	2.9	5.9	5.3
65+	55.1	9.0	9.3	4.8	4.9	3.1	4.9
Where Live							
Urban	31.2%	13.6%	18.5%	11.2%	7.9%	4.2%	13.3%
Suburban	29.8	12.1	17.6	11.2	8.2	6.2	15.3
Rural	37.7	10.0	13.7	7.1	6.1	6.1	11.9
Region							
Northeast	29.5%	12.4%	16.2%	11.0%	6.2%	4.8%	11.3%
Midwest	29.3	9.8	23.0	10.5	9.1	6.4	7.2
South	27.7	12.2	15.0	9.5	6.2	6.9	18.9
West	29.9	16.0	16.1	10.9	7.0	4.2	16.9
Total Respondents	32.0%	12.7%	17.2%	10.4%	7.4%	5.6%	13.9%

* Percent of Total Respondents

Source: Consumer Nutrition Concerns and Restaurant Choices, National Restaurant Association, September 1988, conducted March 1988

Those who eat out less frequently at a fast food place include: non-working women, married couples with no children, senior citizens and individuals who live in rural areas.

Table II-6
Frequency of Eating Out at a Moderately Priced Restaurant in a Two Week Period*

Demographic Characteristics	Number of Times						
	0	1	2	3	4	5	6 or more
Sex							
Male	16.9%	23.5%	18.8%	8.4%	4.8%	2.9%	5.0%
Female	44.6	23.9	17.5	4.8	4.0	3.0	2.1
Female Employment							
Yes	43.3%	22.2%	17.0%	6.0%	2.8%	2.0%	2.0%
No	50.9	26.2	17.0	3.2	5.5	4.3	2.3
Household Income							
Less than $20,000	47.7%	24.5%	12.2%	3.8%	2.7%	2.0%	2.8%
$20,000-$40,000	39.8	27.9	18.6	6.8	6.1	3.0	2.7
More than $40,000	16.9	20.0	23.4	11.6	7.2	4.1	6.6
Household Composition							
Single	47.1%	21.1%	15.5%	6.6%	3.3%	3.0%	2.6%
Married, no children	39.9	28.1	23.0	5.2	3.8	2.7	2.5
Family children	37.2	27.4	16.4	8.1	6.2	2.9	5.7
Age							
18-24	43.8%	27.9%	16.7%	4.9%	2.4%	2.3%	1.1%
25-34	40.6	28.4	19.8	6.1	2.7	2.1	2.2
35-44	28.7	26.0	25.0	6.2	2.4	3.2	7.8
45-54	36.9	32.6	14.6	4.8	5.0	3.3	3.4
55-64	51.4	27.7	10.3	3.6	3.7	2.9	3.6
65+	65.2	19.6	5.7	2.2	3.7	1.4	2.8
Where Live							
Urban	51.5%	21.8%	13.8%	5.7%	3.5%	2.5%	1.5%
Suburban	41.2	25.0	20.5	6.6	4.5	3.0	5.2
Rural	47.8	29.4	14.1	3.9	4.4	3.4	2.6
Region							
Northeast	40.6%	19.1%	20.9%	5.0%	3.9%	3.7%	2.2%
Midwest	38.0	23.2	20.1	5.7	4.4	1.7	2.9
South	40.8	24.5	16.7	6.3	5.6	4.3	1.7
West	47.4	29.8	14.9	4.1	2.9	1.3	8.7
Total Respondents	41.0%	23.4%	16.1%	6.0%	4.4%	2.9%	3.5%

* Percent of total responses.

Source: *Consumer Nutrition Concerns and Restaurant Choices*, National Restaurant Association, September 1986, conducted March, 1986.

Table II-6 Highlights:

Using a two week period, an average of 59 adults will purchase at least one meal at a moderately priced restaurant.

Those who eat out most frequently at moderate restaurants include: upper income individuals, 25 to 44 years old and individuals who live in suburban areas.

Those who eat out less frequently than average include: women, working women, singles, lower income individuals, and individuals who live in rural areas.

Table II-7
Frequency of Eating Out at an Upscale Restaurant in a Two Week Period*

Demographic Characteristics	Number of Times						
	0	1	2	3	4	5	6 or more
Sex							
Male	70.1%	20.0%	4.0%	2.1%	1.1%	0.7%	1.7%
Female	72.4	19.6	5.1	2.1	1.3	0.6	0.9
Female Employment							
Yes	69.6%	19.4%	5.4%	3.0%	1.5%	0.5%	0.6%
No	75.5	19.6	4.1	1.1	1.0	0.8	1.3
Household Income							
Less than $20,000	76.0%	17.3%	2.9%	1.0%	1.6%	—	2.2%
$20,000-$40,000	70.0	19.4	6.4	2.0	0.4	0.7	0.5
More than $40,000	67.9	23.1	4.6	2.9	1.2	1.5	2.9
Household Composition							
Single	71.4%	20.1%	6.1%	0.4%	1.1%	0.7%	2.0%
Married (no children)	70.1	24.4	4.7	0.9	2.0	0.5	1.7
Family (children)	76.0	17.7	2.7	2.5	0.5	0.9	—
Age							
18-24	83.3%	12.0%	2.8%	0.4%	0.6%	0.5%	0.2%
25-34	77.6	16.0	4.7	0.6	1.4	0.4	0.8
35-44	68.4	21.4	5.8	1.4	0.6	—	1.7
45-54	66.5	19.6	5.0	2.0	1.1	2.2	4.8
55-64	67.9	25.0	4.2	—	3.0	—	—
65+	86.0	6.6	1.9	3.6	—	1.2	0.4
Where Live							
Urban	73.0%	17.8%	3.6%	2.1%	2.2%	1.0%	1.3%
Suburban	66.3	21.8	6.2	2.5	1.0	0.9	1.8
Rural	76.1	17.4	4.3	0.7	0.6	—	0.5
Region							
Northeast	66.7%	20.1%	4.6%	2.2%	1.3%	0.7%	2.5%
Midwest	74.1	15.3	2.3	1.1	3.4	0.7	0.6
South	73.1	19.0	4.6	1.8	—	1.0	0.5
West	69.9	20.0	6.6	1.2	0.3	—	2.0
Total Respondents	71.3%	18.7%	4.6%	2.1%	1.2%	0.7%	1.3%

* Percent of total Respondents

Source: *Consumer Nutrition Concerns and Restaurant Choices*, National Restaurant Association, September 1986, conducted March, 1986.

Table II-7 Highlights

During a two week period approximately three-out-of-four adults will eat out at least once at an upscale restaurant.

The vast majority of those who eat at such places do so only once every two weeks.

Those who eat more frequently at upscale restaurants include: working women, upper income individuals, married couples with no children, adults 45 to 54 years old and individuals who live in suburban areas.

Table II-7a
How Consumers Classify Their Eating Out Behavior

Demographic Characteristics	Frequently	Occasionally	Infrequently
Sex			
Male	32.7%	47.1%	20.0%
Female	28.0	43.7	27.7
Female Employment			
Yes	30.8%	48.4%	20.8%
No	26.0	41.2	30.9
Household Income			
Less than $20,000	22.5%	44.4%	31.1%
$20,000–$40,000	30.0	50.2	19.8
More than $40,000	34.7	48.4	16.9
Household Composition			
Single	27.6%	49.6%	22.8%
Married, no children	34.8	41.8	23.6
Family, children	30.3	46.0	23.7
Age			
18–24	23.6%	51.2%	25.2%
25–34	37.4	39.8	22.8
35–44	33.1	49.7	17.6
45–54	26.4	53.0	20.6
55–64	30.4	41.8	27.8
65+	19.4	36.9	43.7
Where Live			
Urban	29.6%	51.9%	21.5%
Suburban	35.1	47.2	17.7
Rural	22.5	39.3	38.3
Region			
Northeast	27.4%	45.3%	27.3%
Midwest	28.0	50.1	21.9
South	31.1	43.6	25.3
West	36.2	42.7	21.1
Total Respondents	30.5%	45.4%	24.1%

Source: Consumer Nutrition Concerns and Restaurant Choices, National Restaurant Association, September 1986.

Table II-8
Where the Decision to Eat Out Is Made

Place of Decision	Fast Food Restaurants	Family Restaurants	Upscale Restaurants
At home	44.6%	51.5%	60.7%
At work	17.4%	11.6%	14.3%
Out shopping	15.2%	9.5%	4.7%
Traveling	11.3%	7.9%	8.4%
School	1.2%	0.7%	—
Visiting			
Socializing	4.1%	7.4%	5.2%
Other	5.8%	9.7%	2.8%
Do not know	0.7%	1.7%	3.8%

Source: How Consumers Make the Decision to Eat Out, National Restaurant Association, August 1982.

Table II-9
When is the Decision to Eat Out Made

When Decision was Made	Fast Food Restaurants	Family Restaurants	Upscale Restaurants
Immediately before	58.8%	41.7%	33.0%
Within two hours	26.1%	33.7%	28.6%
More than two hours before but the same day	5.0%	21.4%	6.6%
More than a day in advance	3.8%	2.3%	26.5%
Do not know	6.2%	0.8%	5.2%

Source: How Consumers Make the Decision to Eat Out, National Restaurant Association, August 1982.

Table II-10
People in Party and Their Influence on Eating at Fast Food Restaurants

Party Member	Percent of Party Members Who Influenced Decision On: Eating Out	Which Restaurant
Spouse or date	60.8%	47.7%
Children 12 and under	24.1%	20.6%
Children 13 to 17	36.6%	30.5%
Relatives (adults) other than spouse	56.9%	45.3%
Friends	64.4%	48.2%
Respondent	60.2%	52.3%

Note: Response rate for respondent is for only parties of two or more persons.

Source: *How Consumers Make the Decisions to Eat Out*, National Restaurant Association, August 1982

Table II-11
People in Party and Their Influence on Eating at Family Restaurants

Party Member	Percent of Party Members Who Influenced Decision On: Eating Out	Which Restaurant
Spouse or date	64.6%	64.2%
Children 12 and under	31.0%	25.7%
Children 13 to 17	46.2%	32.4%
Relatives (adults) other than spouse	57.8%	53.2%
Friends	60.0%	64.2%
Respondent	61.1%	59.6%

Note: Response rate for respondent is for only parties of two or more persons.

Source: *How Consumers Make the Decisions to Eat Out*, National Restaurant Association, August 1982

Table II-12
People in Party and Their Influence on Eating Out at Upscale Restaurants

Party Member	Percent of Party Members Who Influenced Decision On: Eating Out	Which Restaurant
Spouse or date	61.2%	46.5%
Children 12 and under	*	*
Children 13 to 17	*	*
Relatives (adults) other than spouse	45.0%	41.3%
Friends	65.3%	60.0%
Respondent	52.3%	54.9%

* Too small a sample to report.

Note: Response rate for respondent is for only parties of two or more persons.

Source: *How Consumers Make the Decisions to Eat Out*, National Restaurant Association, August 1982

Table II-13
Ranking of Attributes for Selecting a Restaurant

Fast Food Restaurants	Family Restaurants	Upscale Restaurants
1. Quality of food	1. Quality of food	1. Quality of food
2. Friendly service	2. Friendly service	2. Friendly service
3. Convenient location	3. Atmosphere	3. Atmosphere
4. Fast service	4. Nutritious food	4. Variety of menu items
5. Convenient parking	5. Variety of menu items	5. Nutritious food
6. Expected cost of total meal	6. Expected cost of total meal	6. Special menu item
7. Nutritious food	7. Convenient parking	7. Convenient parking
8. Atmosphere	8. Fast service	8. Fast service
9. Price of individual menu item	9. Convenient location	9. Convenient location
10. Variety of menu items	10. Special menu item	10. Expected cost of total meal
11. Special menu item	11. Price of individual menu item	11. Price of individual menu item
12. Special discounts, promotions	12. Non-smoking section	12. Non-smoking section
13. Non-smoking section	13. Special discounts, promotions	13. Special discounts, promotions

Source: How Consumers Make the Decision to Eat Out, National Restaurant Association, August 1982.

Table II-14
Reason for Eating Out by Restaurant Type

Reason	Total Restaurants	Fast Food Restaurants	Family Restaurants	Upscale Restaurants
Lack of time	18.1%	39.7%	7.8%	1.4%
Convenience	37.3	40.8	53.4	16.1
Celebration	6.9	0.3	2.3	20.2
Enjoyment	23.4	5.9	23.0	46.0
Business Meeting	1.7	0.9	1.6	2.8
Shopping	1.7	3.1	1.6	—
Traveling	2.4	2.5	2.9	1.7
Other	8.2	6.4	7.1	11.6

Note: Totals may not add to 100 percent due to rounding and exclusion of non-responses.

Source: Consumer Expectations with Regard to Dining at Fast Food Restaurants, National Restaurant Association, September 1983.

Table II-15
Usual Meal Eaten Out by Restaurant Type

Meal Period	Total Restaurants	Fast Food Restaurants	Family Restaurants	Upscale Restaurants
Breakfast	3.8%	3.3%	7.6%	0.5%
Lunch	31.9	57.6	25.9	5.3
Dinner	62.5	36.4	65.5	92.8
Other	1.6	2.4	0.8	1.3

Note: Totals may not add to 100 percent due to rounding and exclusion of non-responses.

Source: Consumer Expectations with Regard to Dining at Fast Food Restaurants, National Restaurant Association, September 1983.

Table II-16
Ranking of Expectations by Restaurant Type

Total Restaurants	Fast Food Restaurants	Family Restaurants	Upscale Restaurants
1. Cleanliness	1. Cleanliness	1. Cleanliness	1. Cleanliness
2. Cleanliness of the bathrooms	2. Cleanliness of the bathrooms	2. Cleanliness of the bathrooms	2. Tastiness of the food
3. Tastiness of the food	3. Quickness of food delivery	3. Tastiness of the food	3. Cleanliness of the bathrooms
4. Appropriate temperature of the food	4. Tastiness of the food	4. Food cooked the way you asked for it	4. Food cooked the way you asked for it
5. Pleasing appearance of the food	5. Appropriate temperature of the food	5. Appropriate temperature of the food	5. Appropriate temperature of the food
6. Freshness of raw ingredients	6. Pleasing appearance of the food	6. Freshness of raw ingredients	6. Freshness of raw ingredients
7. Food cooked the way you asked for it	7. Freshness of raw ingredients	7. Pleasing appearance of the food	7. Pleasing appearance of the food
8. Comfortable room temperature	8. Food cooked the way you asked for it	8. Comfortable room temperature	8. Comfortable room temperature
9. Restaurant employees who greet you with a smile	9. Restaurant employees who greet you with a smile	9. Restaurant employees who greet you with a smile	9. Comfortable seating
10. Comfortable seating	10. Comfortable room temperature	10. Restaurant employees who ask if you want anything else	10. Restaurant employees who greet you with a smile
11. Food garnished the way you asked for it	11. No wait to be seated or served	11. Comfortable seating	11. Food garnished the way you asked for it
12. Quickness of food delivery	12. Food garnished the way you asked for it	12. Food garnished the way you asked for it	12. Quiet eating atmosphere
13. Restaurant employees who ask if you want anything else	13. Comfortable seating	13. Variety of menu choices	13. Restaurant employees who ask if you want anything else
14. Variety of menu choices	14. Restaurant employees who tell you when your order will be ready	14. Restaurant employees who ask if your meal was all right	14. Restaurant employees who ask if your meal was all right
15. No wait to be seated or served	15. Restaurant employees who ask if you want anything else	15. Quickness of food delivery	15. Variety of menu choices
16. Restaurant employees who ask if your meal was all right	16. Attractive room decorations	16. Quiet eating atmosphere	16. Attractive room decorations
17. Quiet eating atmosphere	17. Variety of menu choices	17. No wait to be seated or served	17. No wait to be seated or served
18. Attractive room decorations	18. Quiet eating atmosphere	18. Attractive room decorations	18. Quickness of food delivery
19. Restaurant employees who tell you when your order will be ready	19. Restaurant employees who ask if your meal was all right	19. Restaurant employees who tell you when your order will be ready	19. Restaurant employees who tell you when your order will be ready
20. Restaurant employees who wear a name tag	20. Restaurant employees who wear a name tag	20. Restaurant employees who wear a name tag	20. Restaurant employees who wear a name tag

Source: Consumer Expectations with Regard to Dining at Fast Food Restaurants, National Restaurant Association, September 1980.

Table II-16 Highlights

Restaurant patrons have the highest expectations regarding the cleanliness of the eating establishment.

Fast food patrons also look for quick food delivery and tasty food.

Family restaurant patrons expect the food to be tasty and cooked the way they asked for it.

Upscale restaurant patrons also want the food to be tasty and want it cooked the way they asked for it.

Table II-17
Expectations when Eating Away From Home

Feature	Total Restaurant Occasions		Total Fast Food Occasions		Total Family Occasions		Total Upscale Occasions	
	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much
Food Expectations								
Appropriate temperature of the food	4.50	64.2%	4.29	53.2%	4.49	62.0%	4.78	80.4%
Pleasing appearance of the food	4.46	61.4%	4.23	51.3%	4.43	58.0%	4.74	78.0%
Tastiness of food	4.57	70.4%	4.32	57.6%	4.60	70.3%	4.85	86.8%
Variety of menu choices	3.87	34.5%	3.33	16.4%	4.03	37.8%	4.36	50.8%
Freshness of raw ingredients	4.43	64.0%	4.16	53.0%	4.40	63.4%	4.74	78.9%
Food cooked the way you asked for it	4.42	66.5%	4.08	50.0%	4.50	66.4%	4.81	84.2%
Food garnished the way you asked for it	4.06	49.4%	3.77	37.1%	4.07	46.9%	4.48	63.8%
Service Expectations								
No wait to be served or seated	3.62	32.3%	3.64	31.2%	3.69	27.9%	3.83	30.7%
Restaurant employees who greet you with a smile	4.20	53.6%	4.07	46.3%	4.29	52.6%	4.60	61.9%
Restaurant employees who wear a name tag	2.89	19.6%	2.91	21.0%	2.92	16.2%	3.02	18.9%
Quickness of food delivery	4.08	41.4%	4.38	56.3%	4.02	33.8%	3.78	29.7%
Restaurant employees who ask if you want anything else	4.09	44.1%	3.90	28.7%	4.09	48.2%	4.42	58.2%
Restaurant employees who tell you when your order will be ready	3.64	31.1%	3.67	34.1%	3.63	26.0%	3.72	32.6%
Restaurant employees who ask if your meal was alright	3.79	36.5%	3.71	25.9%	4.02	40.7%	4.38	55.0%
Atmosphere Expectations								
Comfortable room temperature	4.25	53.1%	3.89	35.5%	4.31	55.3%	4.61	69.3%
Attractive room decorations	3.73	31.6%	3.34	20.7%	3.60	24.3%	4.36	53.2%
Cleanliness	4.76	81.6%	4.64	78.0%	4.76	81.9%	4.89	89.4%
Cleanliness of the bathrooms	4.64	76.8%	4.42	71.0%	4.63	76.3%	4.81	84.8%
Comfortable seating	4.16	45.6%	3.77	41.6%	4.16	44.6%	4.59	64.8%
Quiet eating atmosphere	3.75	34.0%	3.15	18.6%	3.79	29.2%	4.42	58.6%

Source: Consumer Expectations with Regard to Dining at Fast Food Restaurants, National Restaurant Association, September 1983.
1 = expect very little 5 = expect very much

Table II-18
Attitudes About Restaurants

Statement	Strongly Agree	Agree	Neither Agree Nor Disagree	Disagree	Strongly Disagree
I try to go to restaurants which serve salads and vegetables	60.9%	29.3%	2.0%	6.6%	1.0%
A discourteous restaurant employee could keep me from returning to a restaurant	76.0	16.2	0.3	5.4	2.1
It is important for a restaurant to make its customers feel at ease	84.0	14.6	0.4	0.8	0.0
I think that fresh flowers and live plants improve a restaurant's atmosphere	43.0	42.5	0.9	6.2	1.4
It is important for food to look appetizing in restaurants	87.9	11.9	0.0	0.3	0.0
I expect the food at fast food restaurants to be consistent from one visit to the next	69.8	22.4	2.6	3.9	1.0
I think fast food and family restaurants should accommodate children	84.3	12.7	0.5	1.4	1.0
I think there should be a host or hostess to greet customers when they enter a family restaurant	35.5	41.6	1.6	18.6	2.4
When eating at a fancy restaurant, I expect the meal to be unique and special	67.9	25.2	0.6	5.5	0.6
Waiters and waitresses at fancy restaurants should be knowledgeable about the menu and how food is prepared	87.0	11.4	0.1	1.1	0.2
I think there should be a host or hostess to greet customers when they enter a fancy restaurant	83.5	13.6	0.4	1.4	1.1

Source: Consumer Expectations with Regard to Dining at Fast Food Restaurants, National Restaurant Association, September 1983

Table II-18 Highlights

Restaurant patrons want the food to look appetizing, and they like waiters and waitresses to be knowledgeable about how food is prepared.

Restaurant patrons prefer restaurants where they are made to feel at ease.

A discourteous employee will cause a drop in patronage.

Most want fast food to be consistent from one visit to the next.

Many prefer restaurants which serve salads and vegetables.

Table II-19
Expectations When Eating at Fast Food Restaurants by Usage of Fast Food Restaurants

	All Fast Food Patrons		Light Users		Medium Users		Heavy Users	
Expectation	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much
Food Expectations								
Appropriate temperature of the food	4.29	53.4%	4.53	62.8%	4.30	56.8%	4.14	44.3%
Pleasing appearance of the food	4.23	51.3%	4.37	56.0%	4.32	54.3%	4.14	45.6%
Tastiness of food	4.52	61.6%	4.61	66.7%	4.47	59.8%	4.21	50.8%
Variety of menu choices	3.34	18.4%	3.29	22.6%	3.41	20.5%	3.31	13.8%
Freshness of raw ingredients	4.16	53.0%	4.33	61.9%	4.20	55.6%	4.01	45.0%
Food cooked the way you ask for it	4.05	50.9%	4.24	61.8%	4.11	53.2%	3.93	45.4%
Food garnished the way you ask for it	3.71	41.1%	3.94	53.0%	3.83	42.5%	3.67	33.4%
Service Expectations								
No wait to be served or seated	3.84	47.8%	3.75	37.2%	3.86	46.7%	3.88	38.9%
Restaurant employees who greet you with a smile	4.02	46.5%	4.23	53.0%	4.07	51.5%	3.97	40.6%
Restaurant employees who wear a name tag	2.97	23.0%	2.96	21.5%	2.95	23.1%	2.96	21.1%
Quickness of food delivery	4.36	56.8%	4.49	69.6%	4.29	52.8%	4.37	55.9%
Restaurant employees who ask if you want anything else	3.56	29.7%	3.69	33.3%	3.54	32.5%	3.45	26.4%
Restaurant employees who tell you when your order will be ready	3.67	34.1%	3.85	42.2%	3.76	36.8%	3.65	32.9%
Restaurant employees who ask if your meal was alright	3.11	23.1%	3.42	30.5%	3.27	26.9%	3.03	20.5%
Atmosphere Expectations								
Comfortable room temperature	3.89	38.5%	3.87	44.2%	3.97	40.4%	3.85	34.5%
Attractive room decorations	3.34	20.7%	3.42	19.7%	3.43	21.7%	3.30	20.1%
Cleanliness	4.64	75.0%	4.77	82.4%	4.67	76.9%	4.59	71.4%
Cleanliness of the bathrooms	4.52	71.0%	4.76	81.4%	4.54	71.1%	4.43	67.6%
Comfortable seating	3.77	31.6%	3.75	36.3%	3.80	31.1%	3.70	29.1%
Quiet eating atmosphere	3.15	18.6%	3.31	19.7%	3.24	20.5%	3.01	16.3%

Source: Consumer Expectations with Regard to Dining at Fast Food Restaurants, National Restaurant Association, September 1983.
1 = expect very little 5 = expect very much

Table II-19 Highlights

Frequent (heavy or very heavy users) fast food patrons tend to have lower expectations than do infrequent patrons, especially when it comes to such things as tasty food, pleasing appearance of the food, freshness of raw ingredients and being greeted with a smile.

Frequent patrons have high expectations with regard to the quickness of food delivery.

Table II-20
Expectations When Eating at Fast Food Restaurants By Reason for Eating Out and Meal Occasion

	Very Heavy Users		Reason for Eating Out					
			Lack of Time		Convenient		Enjoyment	
Expectation	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much
Food Expectations								
Appropriate temperature of the food	4.40	68.1%	4.25	60.8%	4.30	63.6%	4.18	54.2%
Pleasing appearance of the food	4.23	52.7%	4.13	46.8%	4.32	54.7%	4.29	49.4%
Tastiness of food	4.36	61.6%	4.19	50.5%	4.40	62.3%	4.35	59.0%
Variety of menu choices	3.61	21.1%	3.53	18.6%	3.39	13.8%	3.46	24.1%
Freshness of raw ingredients	4.22	58.5%	4.06	49.2%	4.23	57.6%	4.16	47.0%
Food cooked the way you ordered it	4.05	51.5%	3.96	45.6%	4.05	52.3%	4.32	66.2%
Food garnished the way you ordered it	3.69	41.9%	3.69	36.7%	3.76	40.5%	3.84	49.4%
Service Expectations								
No wait to be served or seated	3.79	38.7%	3.69	33.2%	3.87	39.2%	3.60	26.3%
Restaurant employees who greet you with a smile	3.95	44.6%	3.90	37.2%	4.11	49.5%	4.06	54.2%
Restaurant employees who wear a name tag	2.99	26.1%	3.05	23.5%	2.80	21.5%	2.98	21.7%
Quickness of food delivery	4.45	63.1%	4.39	57.4%	4.36	57.1%	4.22	53.0%
Restaurant employees who ask if you want anything else	3.46	28.1%	3.38	20.4%	3.53	29.9%	4.07	48.2%
Restaurant employees who tell you when your order will be ready	3.47	30.0%	3.30	23.4%	3.68	36.3%	3.69	34.9%
Restaurant employees who ask if your meal was alright	2.77	18.6%	3.09	22.4%	3.09	21.2%	3.53	38.6%
Atmosphere Expectations								
Comfortable room temperature	3.81	39.3%	3.91	38.7%	3.92	39.1%	4.28	54.2%
Attractive room decorations	3.18	19.6%	3.34	21.0%	3.37	21.0%	3.60	27.7%
Cleanliness	4.61	74.3%	4.60	71.3%	4.64	76.4%	4.69	80.7%
Cleanliness of the bathrooms	4.57	72.3%	4.44	60.1%	4.55	72.4%	4.61	75.9%
Comfortable seating	3.79	34.2%	3.75	34.1%	3.77	29.0%	4.11	43.4%
Quiet eating atmosphere	3.13	18.4%	3.13	19.8%	3.19	18.9%	3.31	24.1%

Source: Consumer Expectations with Regard to Dining at Fast Food Restaurants, National Restaurant Association, September 1983
1 = expect very little ... 5 = expect very much

Table continues

Table II-20
Expectations When Eating at Fast Food Restaurants
By Reason for Eating Out and Meal Occasion

	Meal Occasion					
	Lunch		Dinner		Other Meal	
Expectation	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much
Food Expectations						
Appropriate temperature of the food	4.29	52.6%	4.30	55.6%	4.26	47.0%
Pleasing appearance of the food	4.21	47.0%	4.32	53.0%	4.21	44.5%
Tastiness of food	4.30	57.6%	4.36	58.7%	4.31	53.1%
Variety of menu choices	3.34	18.0%	3.31	19.1%	3.29	19.8%
Freshness of raw ingredients	4.16	55.5%	4.17	49.5%	4.16	49.5%
Food cooked the way you ask for it	4.32	49.2%	4.13	55.0%	3.83	44.5%
Food garnished the way you ask for it	3.74	40.0%	3.80	43.5%	3.56	39.6%
Service Expectations						
No wait to be served or seated	3.85	38.0%	3.79	36.1%	4.07	45.7%
Restaurant employees who greet you with a smile	4.02	48.2%	4.08	48.8%	3.98	35.8%
Restaurant employees who wear a name tag	2.36	23.6%	3.02	22.4%	2.60	21.0%
Quickness of food delivery	4.40	58.4%	4.29	54.2%	4.42	56.9%
Restaurant employees who ask if you want anything else	3.47	29.2%	3.59	30.8%	3.40	29.7%
Restaurant employees who tell you when your order will be ready	3.71	35.2%	3.63	33.0%	3.62	32.2%
Restaurant employees who ask if your meal was alright	3.06	21.8%	3.21	24.8%	3.01	27.2%
Atmosphere Expectations						
Comfortable room temperature	3.86	37.5%	3.97	39.8%	3.84	42.0%
Attractive room decorations	3.31	20.1%	3.37	21.8%	3.42	21.0%
Cleanliness	4.61	73.6%	4.68	77.0%	4.73	80.3%
Cleanliness of the bathrooms	4.53	70.3%	4.64	72.8%	4.46	70.4%
Comfortable seating	3.72	31.9%	3.85	31.2%	3.73	32.2%
Quiet eating atmosphere	3.09	16.9%	3.26	21.3%	3.06	19.8%

Table II-20 Highlights

Consumers who eat at fast food places because of lack of time or convenience have very high expectations with regard to quick food delivery.

Atmosphere and service factors are of little concern to the convenience and lack of time patrons.

Lunch patrons place considerable importance on quick food delivery.

Table II-21
Expectations When Eating at Family Restaurants
By Usage of Family Restaurants

	All Family Patrons		Light Users		Medium Users		Heavy Users	
	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much
Food Expectations								
Appropriate temperature of the food	4.39	62.0%	4.32	64.0%	4.47	60.7%	4.49	62.7%
Pleasing appearance of the food	4.43	58.6%	4.43	57.2%	4.46	60.7%	4.40	55.0%
Tastiness of the food	4.60	70.3%	4.61	72.1%	4.60	70.6%	4.59	69.4%
Variety of menu choices	4.03	37.6%	4.10	42.2%	4.03	38.9%	4.02	37.3%
Freshness of raw ingredients	4.46	60.1%	4.56	68.3%	4.46	64.5%	4.44	61.1%
Food cooked the way you asked for it	4.57	65.4%	4.49	57.4%	4.66	67.8%	4.47	61.9%
Food garnished the way you asked for it	4.07	46.9%	4.09	46.3%	4.11	48.4%	4.03	45.2%
Service Expectations								
No wait to be seated or served	3.79	27.3%	3.64	25.3%	3.69	22.9%	3.92	31.5%
Restaurant employees who greet you with a smile	4.26	52.8%	4.12	47.0%	4.29	49.7%	4.35	57.4%
Restaurant employees who wear a name tag	2.82	16.4%	2.57	10.2%	2.80	15.8%	2.80	18.4%
Quickness of food delivery	4.02	33.6%	3.94	28.8%	4.05	32.2%	3.98	33.8%
Restaurant employees who ask if you want anything else	4.19	48.2%	4.10	46.3%	4.15	47.1%	4.25	49.9%
Restaurant employees who tell you when your order will be ready	3.53	26.0%	3.48	26.5%	3.66	29.7%	3.49	25.9%
Restaurant employees who ask if your meal was alright	4.02	40.7%	3.97	38.2%	4.02	40.4%	4.02	41.6%
Atmosphere Expectations								
Comfortable room temperature	4.34	55.4%	4.28	51.1%	4.31	56.1%	4.38	56.7%
Attractive room decorations	3.60	24.3%	3.57	22.5%	3.64	25.2%	3.56	23.5%
Cleanliness	4.75	81.9%	4.84	86.0%	4.72	79.9%	4.76	83.1%
Cleanliness of the bathrooms	4.63	76.3%	4.72	79.6%	4.62	76.0%	4.62	75.8%
Comfortable seating	4.18	44.6%	4.13	38.8%	4.23	46.7%	4.14	43.7%
Quiet eating atmosphere	3.79	29.2%	3.74	22.4%	3.79	28.6%	3.79	31.9%

Source: Consumer Expectations with Regard to Dining at Family Restaurants, National Restaurant Association, November 1983.
1 = expect very little 5 = expect very much

Table II-21 Highlights

Frequent family restaurant patrons have significantly higher expectations concerning such things as being seated and served with no delay, being greeted with a smile and being asked if they want anything else.

Occasional patrons have higher than average expectations regarding food being cooked per order and employees wearing name tags.

Light users are especially interested in the establishment being clean, but are less concerned with being greeted with a smile or having employees wear name tags.

Table II-22
Expectations When Eating at Family Restaurants
By Reason for Eating Out and Meal Occasion

	Lack of Time		Convenience		Enjoyment		Lunch		Dinner	
	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much
Food Expectations										
Appropriate temperature of the food	4.49	60.0%	4.48	62.3%	4.56	64.5%	4.45	55.7%	4.52	65.3%
Pleasing appearance of the food	4.38	48.8%	4.39	57.0%	4.56	64.9%	4.40	54.4%	4.47	60.5%
Tastiness of the food	4.62	73.5%	4.58	70.2%	4.68	74.0%	4.57	66.8%	4.64	73.2%
Variety of menu choices	3.91	28.8%	3.98	34.6%	4.21	48.0%	3.99	37.0%	4.05	37.4%
Freshness of raw ingredients	4.35	56.7%	4.44	61.5%	4.61	68.0%	4.36	58.8%	4.50	64.9%
Food cooked the way you asked for it	4.38	62.2%	4.52	64.3%	4.65	75.1%	4.50	59.8%	4.52	68.2%
Food garnished the way you asked for it	4.11	52.2%	3.97	43.8%	4.33	58.1%	3.88	38.6%	4.12	49.9%
Service Expectations										
No wait to be seated or served	3.82	25.5%	3.82	28.3%	3.79	28.0%	3.81	26.9%	3.78	27.4%
Restaurant employees who greet you with a smile	4.20	47.8%	4.23	50.7%	4.45	60.4%	4.19	44.3%	4.32	56.2%
Restaurant employees who wear a name tag	2.89	14.4%	2.71	10.8%	2.99	21.5%	2.84	18.8%	2.83	15.9%
Quickness of food delivery	4.09	30.0%	4.05	35.1%	3.96	31.4%	3.97	31.2%	4.05	34.6%
Restaurant employees who ask if you want anything else	4.20	42.2%	4.18	47.0%	4.28	55.1%	4.04	40.0%	4.21	50.5%
Restaurant employees who tell you when your order will be ready	3.63	27.8%	3.54	28.0%	3.50	21.5%	3.53	23.5%	3.52	26.0%
Restaurant employees who ask if your meal was alright	3.91	30.0%	4.02	41.6%	4.04	43.4%	3.96	34.6%	4.03	42.3%
Atmosphere Expectations										
Comfortable room temperature	4.20	46.6%	4.33	54.7%	4.41	61.2%	4.30	50.7%	4.37	58.4%
Attractive room decorations	3.42	13.2%	3.56	22.9%	3.76	31.0%	3.53	22.9%	3.66	25.4%
Cleanliness	4.71	80.0%	4.73	80.7%	4.82	84.5%	4.73	79.5%	4.76	82.9%
Cleanliness of the bathrooms	4.56	75.5%	4.61	75.2%	4.69	78.5%	4.53	70.1%	4.67	79.0%
Comfortable seating	4.07	35.5%	4.14	44.0%	4.39	54.0%	3.99	34.3%	4.28	49.8%
Quiet eating atmosphere	3.33	22.1%	3.78	29.2%	3.99	37.4%	3.76	25.6%	3.84	31.8%

Source: Consumer Expectations with Regard to Dining at Family Restaurants, National Restaurant Association, November 1983.
1 = expect very little 5 = expect very much

Table II-22 Highlights

Individuals who eat at family restaurants because it is enjoyable have consistently higher expectations for most of these factors than do lack of time and convenience patrons.

Table II-23
Expectations When Dining at Upscale Restaurants

	All Upscale Patrons		Light Users		Medium Users		Heavy Users	
	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much
Food Expectations								
Appropriate temperature of the food	4.78	80.4%	4.77	80.4%	4.79	77.9%	4.86	87.4%
Pleasing appearance of the food	4.74	78.0%	4.79	80.4%	4.72	76.7%	4.75	77.4%
Tastiness of the food	4.85	86.8%	4.88	89.5%	4.82	85.6%	4.84	85.3%
Variety of menu choices	4.36	50.8%	4.37	49.8%	4.32	49.3%	4.42	56.6%
Freshness of raw ingredients	4.74	78.9%	4.74	79.6%	4.71	77.9%	4.81	80.6%
Food cooked the way you asked for it	4.81	84.2%	4.81	83.4%	4.80	84.3%	4.83	85.3%
Food garnished the way you asked for it	4.46	63.8%	4.56	66.9%	4.45	63.4%	4.46	60.8%
Service Expectations								
No wait to be seated or served	3.83	30.7%	3.94	33.0%	3.89	30.6%	3.71	26.2%
Restaurant employees who greet you with a smile	4.50	67.3%	4.49	63.0%	4.46	58.4%	4.63	69.7%
Restaurant employees who wear a name tag	2.82	18.8%	2.90	19.6%	2.74	18.2%	2.79	18.4%
Quickness of food delivery	3.78	29.7%	3.83	30.5%	3.71	28.4%	3.90	30.9%
Restaurant employees who ask if you want anything else	4.42	58.2%	4.42	59.6%	4.38	55.3%	4.51	66.5%
Restaurant employees who tell you when your order will be ready	3.72	32.6%	3.73	32.0%	3.75	31.8%	3.59	35.1%
Restaurant employees who ask if your meal was alright	4.38	55.0%	4.34	54.8%	4.39	54.4%	4.44	56.5%
Atmosphere Expectations								
Comfortable room temperature	4.67	69.3%	4.59	67.2%	4.69	68.8%	4.67	73.8%
Attractive room decorations	4.35	53.2%	4.41	56.2%	4.27	49.2%	4.45	58.7%
Cleanliness	4.89	89.4%	4.88	89.2%	4.89	89.9%	4.88	88.5%
Cleanliness of the bathrooms	4.81	84.8%	4.86	86.9%	4.78	82.8%	4.81	83.2%
Comfortable seating	4.59	64.8%	4.64	68.8%	4.54	61.1%	4.65	68.1%
Quiet eating atmosphere	4.47	58.6%	4.52	59.4%	4.43	57.6%	4.52	60.7%

Source: Consumer Expectations with Regard to Dining at Atmosphere Restaurants, National Restaurant Association, November 1983
1 = expect very little 5 = expect very much

Table II-23 Highlights

Infrequent upscale patrons have relatively high expectations for pleasing appearance of the food, tastiness of the food, no wait to be seated or served, clean bathrooms and comfortable seats.

Frequent patrons have especially high expectations for food served at the appropriate temperature, fresh raw ingredients, being greeted with a smile and having the restaurant attractively decorated.

Occasional restaurant patrons have significantly lower expectations regarding food temperature, food appearance, quick food delivery, attractive room decorations, comfortable seats and quiet eating atmosphere.

Table II-24
Expectations When Dining at Upscale Restaurants by Reason For Eating Out

	Convenience		Celebration		Enjoyment	
	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much	Mean Value	% Saying Very Much
Food Expectations						
Appropriate temperature of the food	4.79	82.6%	4.81	81.7%	4.76	77.9%
Pleasing appearance of the food	4.70	75.8%	4.81	80.8%	4.73	76.8%
Tastiness of the food	4.89	91.0%	4.87	91.0%	4.83	83.5%
Variety of menu choices	4.39	49.4%	4.42	55.9%	4.32	50.4%
Freshness of raw ingredients	4.83	86.0%	4.76	81.2%	4.69	74.0%
Food cooked the way you asked for it	4.89	91.0%	4.80	84.0%	4.79	82.3%
Food garnished the way you asked for it	4.42	64.6%	4.57	68.8%	4.47	62.6%
Service Expectations						
No wait to be seated or served	3.83	31.5%	3.78	28.2%	3.86	31.7%
Restaurant employees who greet you with a smile	4.41	58.4%	4.42	56.8%	4.56	65.6%
Restaurant employees who wear a name tag	2.57	13.5%	2.62	19.7%	2.93	20.3%
Quickness of food delivery	3.94	34.9%	3.73	29.0%	3.77	28.2%
Restaurant employees who ask if you want anything else	4.51	65.1%	4.24	44.6%	4.45	60.4%
Restaurant employees who tell you when your order will be ready	3.84	38.2%	3.71	28.6%	3.76	34.3%
Restaurant employees who ask if your meal was alright	4.36	55.6%	4.30	49.2%	4.43	56.5%
Atmosphere Expectations						
Comfortable room temperature	4.70	75.9%	4.61	66.1%	4.60	69.7%
Attractive room decorations	4.24	49.4%	4.34	47.7%	4.38	56.1%
Cleanliness	4.94	95.5%	4.87	87.5%	4.87	88.2%
Cleanliness of the bathrooms	4.82	87.6%	4.72	77.6%	4.83	85.5%
Comfortable seating	4.55	60.7%	4.58	63.9%	4.61	66.2%
Quiet eating atmosphere	4.40	61.2%	4.54	59.4%	4.50	60.1%

Source: Consumer Expectations with Regard to Dining at Atmosphere Restaurants, National Restaurant Association, November 1983
1 = expect very little 5 = expect very much

Table II-24 Highlights

People who tend to eat at upscale restaurants because it is convenient place considerable importance on the freshness of raw ingredients, food cooked the way it was ordered, quick food delivery, comfortable room temperature and a clean establishment.

People who are likely to eat at an upscale restaurant to celebrate a special event are looking for things which can enhance the occasion—appearance of the food, quiet eating atmosphere.

Enjoyment patrons want things which can make the dining out experience pleasant such as being greeted with a smile, being asked if the meal is alright and comfortable seats.

Table II-25
Proportion of Consumers Reporting Changed Eating Habits at Restaurants, 1983 versus 1986

	1983	1986
Total	40%	39%
Sex		
Male	35	36
Female	44	42
Age		
18 to 24 years	30	22
25 to 34 years	42	42
35 to 49 years	41	40
50 to 64 years	45	50
65 years or older	39	46
Education		
College graduate	47	46
High School graduate	41	39
Less than high school graduate	27	32
Annual household income		
$30,000 and over	48	40
$20,000 to $29,999	39	41
$15,000 to $19,999	33	45
under $15,000	42	38
Women's employment status		
Employed full time	51	41
Employed part time	42	47
Not employed	38	41

Source: Gallup/NRA Proprietary Question, September 1983 and April 1986

Table II-25 Highlights

The proportion of consumers who have changed their eating out habits increasing consumption of fruits, vegetables, whole grains or decreasing consumption of refined sugar, excess fats and salts has remained unchanged between 1983 and 1986. A total of 39

Table II-26
Major Changes Consumers Have Made When Ordering at Restaurants, 1983 versus 1986

	Proportions of Respondents Changing Eating Habits	
Change	**1983**	**1986**
Use less salt/no salt	25%	23%
More fish/seafood	20	21
Use less sugar/no sugar	20	22
More vegetables	18	26
More salads	18	18
Less fats	16	20
Less meat	12	17
More fruits	11	10
Avoid fried foods	10	15
More poultry	9	9
Choose lean meats	9	6
Avoid starches	8	4
Less dessert/no dessert	7	8
More grains	4	6
Health/natural foods	2	2
Less calories	2	2
No soda	1	1
More meat	1	1

Note: Proportions add to over 100 percent due to multiple responses. Percent of those who have changed their eating habits at restaurants.

Source: Gallup/NRA Proprietary Question, September 1983 and April 1986

Table II-26 Highlights

A larger proportion of consumers surveyed in 1986 compared to 1983 said they are using less sugar or no sugar, eating more fish/seafood, more vegetables, less fats, less meat, avoiding fried foods, eating less or no dessert and eating more grains when dining away from home.

Many consumers are also using less or no salt, eating more fruits, choosing lean meats, and avoiding starches when dining away from home.

Table II-27
Foods and Beverages Likely To Try At A Restaurant

Item	Percent Very Likely To Try
Fresh Fruit	78%
Lean Meats	64%
Broiled/Baked Fish or Seafood	63%
Whole Wheat Breads, Rolls, Crackers	60%
Steak or Roast Beef	58%
Poultry Without Skin	47%
Raw Vegetable Appetizer	45%
Whole Grain Muffins	41%
Vegetables Seasoned With Herbs or Lemon Juice only	36%
Food Cooked Without Salt	35%
Regular Soft Drink	35%
Fried Fish/Seafood	34%
Low Fat Cottage Cheese	33%
Cereal with Low Fat or Skim Milk	33%
Fried Chicken	32%
Reduced Calorie Salad Dressing	30%
Diet Soft Drink	30%
Caffeine Free Soft Drink	30%
Whole Grain Pancake/Waffles	29%
Caffeine Free Coffee	28%
Premium Ice Cream	28%
Low Fat, Low Calorie Fruit Desserts	26%
Sugar Substitutes	26%
Bagel/Bread with Low Fat Cream Cheese	24%
Rich, Gooey or Chocolate Dessert	22%
Fruit Ice/Sorbet	22%
Calorie Controlled Entree	20%
Low Cholesterol Egg Substitute	9%

Source: Consumer Nutrition Concerns and Restaurant Choices, National Restaurant Association, September 1986

Table II-27 Highlights

Consumers are ready to try many different items when dining out. Included are poultry without skin, vegetables seasoned only with herbs or lemon juice and food cooked without salt.

Consumers also have a preference for many of the old standbys—steak, fried fish or chicken.

Table II-28
Characteristics of Health and Nutrition Consumer Groups

	Traditional Consumers	Weight Conscious Consumers	Health Conscious Consumers	Uncommitted Consumers
Demographic Characteristics[1]	Men; 18 to 34 years old; live in rural areas; high school education; income under $40,000	Women; 45 to 54 years old; female does not work; live in an urban area; income over $40,000	Women; 55 years old and older; married with no children; college educated	Men; 35 to 64 years old; employed full time; live in a suburban area; income over $40,000
Behavioral characteristics[1]	Frequent fast food places; do not diet; exercise moderately; do not restrict use of salt, sugar, fat and cholesterol; do not consume foods high in fiber, starch and calcium	Patronize moderately priced or fine dining establishments; diet; restrict use of salt, sugar, fat and cholesterol; increase use of foods high in fiber and calcium	Eat infrequently at fast food places; patronize midscale and upscale restaurants; exercise frequently; restrict use of salt, sugar, fat and cholesterol; eat foods high in fiber, calcium and starch	Frequent fast food places and midscale restaurants; do not diet; average in their attempts to restrict use of salt, sugar, fat and cholesterol; do not eat foods high in fiber, calcium and starch
Foods very likely to order in restaurants[1]	Steak or roast beef, regular soft drinks; fried chicken; fried fish/seafood; rich desserts; premium ice cream	Reduced calorie salad dressing, sugar substitute; calorie controlled entries; lowfat, low calorie fruit based desserts; diet soft drinks; raw vegetable appetizer; low cholesterol egg substitute	Vegetables seasoned only with herbs or lemon juice; broiled/baked fish; raw vegetable appetizers; whole wheat breads, rolls and crackers; whole grain pancakes; poultry without skin; food cooked without salt; fresh fruit	Whole wheat bread, rolls and crackers; poultry without skin; diet soft drinks, broiled or baked fish/seafood

Table II-28
Characteristics of Health and Nutrition Consumer Groups

	Traditional Consumers	Weight Conscious Consumers	Health Conscious Consumers	Uncommitted Consumers
Foods less likely to order in restaurants[2]	Vegetables seasoned only with herbs or lemon juice; whole grain muffins; poultry without skin; reduced calorie salad dressing; low fat, low calorie fruit based dessert; calorie controlled entree; raw vegetable appetizer; whole wheat breads, rolls or crackers	Regular soft drinks; steak or roast beef; fried fish/seafood; fried chicken; rich desserts; premium ice cream	Regular soft drinks; diet soft drinks; fried chicken; reduced calorie salad dressing; sugar substitute; fried fish	Steak or roast beef; fried chicken; fried fish/seafood; lean meats; reduced calorie salad dressing; premium ice cream; rich desserts

1. Members of all four groups come from all demographic and behavior segments. The characteristics presented here represent those where a greater proportion than average occur.
2. Members of all groups are likely to order any of the foods listed in the survey. The ones presented here represent those foods where an above average likely to order or a below average unlikely to order proportion of group members responded.

Source: *Consumer Nutrition Concerns and Restaurant Choices*, National Restaurant Association, September 1986.

Table II-28 Highlights

Traditional Consumers are weak, low gourmet groups, and they tend to eat wherever they like.

They like steak, regular soft drinks, fried chicken, fried fish and desserts.

Weight Conscious Consumers pay attention to the calorie content of food, and overall content of the food they eat.

The key words for this group are diet, reduced calorie and sugarless.

Health Conscious Consumers are especially interested in the nutritional content of the food they eat.

They particularly favor foods which help them comply with the government's dietary guidelines.

Uncommitted Consumers are difficult to describe.

They tend to skip meals, and often they eat many small meals and snacks.

They tend to be busy consumers where the restaurant occasion often dictates what they may eat.

Table II-29
Health and Nutrition Consumer Groups

Health and Nutrition Consumer Group	Percent of Adult Population	Percent of Reported Occasions			
		Total	Fast Food	Moderately Priced	Fine Dining
Traditional Consumers	37%	43%	46%	39%	32%
Weight conscious	28	25	23	26	31
Health Conscious	19	17	16	16	26
Uncommitted	12	12	12	14	8

Source: *Consumer Nutrition Concerns and Restaurant Choices*, National Restaurant Association, September 1986.

Note: The number of eating out occasions are based on respondent recall and not on continuous recording of eating out behavior. Also, the timing of the study, February and March, may not be indicative of year round behavior. However, the occasion breakdown is similar to CREST and therefore the National Restaurant Association believes it provides a reliable view of eating out behavior.

Table II-29 Highlights

Health Conscious Consumers, who accounted for 19 percent of the adult population, are responsible for a disproportionate 26 percent of eating out occasions.

Fine dining occasions, the most important to the full service restaurant industry, account for nearly half the visits by this group.

Weight Conscious Consumers, who are also heavy users, have average to fast out-of-home eating habits. They account for 31 percent of fine dining out occasions.

Health Conscious Consumers account for 16 percent of fast eating out visits, and they are especially likely to visit this eating place.

Uncommitted Consumers are responsible for 12 percent of the restaurant occasions and tend to go to moderately priced restaurants.

Table II-30
Items Likely to Try at Restaurants by Health and Nutrition Consumer Groups

Item	Percent Saying Very Likely to Try				
	Total Respondents	Traditional Consumers	Weight Conscious Consumers	Health Conscious Consumers	Uncommitted Consumers
Fresh fruit	78.2%	73.6%	79.6%	87.7%	73.3%
Lean meats	64.4	61.6	67.3	69.4	52.2
Broiled/baked fish or seafood	62.6	54.5	62.4	77.8	67.4
Whole wheat breads, rolls, crackers	59.5	50.2	58.6	69.7	72.9
Steak or roast beef	58.0	74.7	46.0	52.4	37.5
Poultry without skin	46.5	34.9	51.1	56.4	53.5
Raw vegetable appetizer	44.9	35.0	53.6	57.6	39.3
Whole grain muffins	40.5	27.6	45.2	57.6	40.1
Vegetables seasoned only with herbs or lemon juice	35.9	21.1	43.2	54.5	36.8
Food cooked without salt	35.9	27.8	40.9	44.5	34.6
Regular soft drink	34.7	51.3	20.5	26.0	30.0
Fried fish or seafood	34.1	47.7	22.8	30.5	20.2
Low fat cottage cheese	32.8	24.6	38.4	38.5	33.8
Cereal with low fat or skim milk	33.2	25.1	40.1	34.4	34.5
Fried chicken	32.3	47.4	21.7	24.9	15.3
Reduced calorie salad dressing	29.7	18.4	50.5	25.1	18.8
Diet soft drink	29.6	21.8	40.7	22.7	34.6
Caffeine free soft drink	29.5	22.8	36.2	30.1	32.4
Whole grain pancakes or waffles	28.5	24.4	28.2	38.9	24.3
Caffeine free coffee	28.3	20.5	34.6	30.9	29.9
Premium ice cream	27.5	36.0	19.8	25.8	20.9
Low fat, low calorie fruit desserts	25.1	15.1	37.1	30.0	20.0
Sugar substitutes	24.8	17.7	39.0	19.6	21.3
Bagel or bread with low fat cream cheese	23.8	21.2	25.1	24.1	25.7
Rich, gooey or chocolate dessert	21.9	31.1	12.6	19.6	15.9
Fruit ices or sorbet	21.6	21.3	21.3	23.1	18.8
Calorie controlled entree	19.9	10.2	32.2	22.4	17.4
Low cholesterol egg substitute	9.0	4.8	17.5	6.5	8.4

Source: Consumer Nutrition Concerns and Restaurant Choices, National Restaurant Association, September 1986

Table II-31
Attitudes Toward Restaurants by Health and Nutrition Groups

Attitudinal Statement	Percent Saying Strongly Agree				
	Total Respondents	Traditional Consumers	Weight Conscious Consumers	Health Conscious Consumers	Uncommitted Consumers
Expensive restaurants ought to serve fresh rather than frozen foods	56.4%	54.3%	64.7%	56.3%	45.4%
You are concerned about how much alcohol you consume for health reasons	44.7	38.4	55.0	46.5	36.3
You are concerned about how much alcohol you consume when drinking and driving	72.5	67.5	75.5	74.8	77.7
You are drinking less alcohol when you eat out than you did two years ago	47.9	43.9	53.5	53.0	46.4
Restaurants ought to offer different size portions for different size appetites	57.5	56.0	62.7	56.2	59.9
Restaurants ought to offer meals specially prepared for children	72.0	74.3	77.6	66.6	69.4
You prefer restaurants that feature salad bars	63.2	62.7	68.9	58.8	60.1
When you eat out you eat foods that are different from the foods you eat at home	44.6	47.4	48.6	38.9	40.8
You would eat out more often if it wasn't so fattening	14.9	12.2	26.7	10.5	8.4
When eating out for a special occasion you are less concerned about the nutritional value of the food you eat	30.1	37.8	26.5	22.7	30.4
Your favorite type of restaurant is one where everything is made from scratch	47.2	42.4	55.4	54.8	34.6
You make a point of ordering foods that are nutritious when eating out	29.4	14.8	54.7	36.5	11.1
You wish that more restaurants in your area offered food for people on restrictive diets	38.4	29.0	56.0	37.1	34.0

Table continues

Table II-31 Highlights

Weight Conscious Consumers and Health Conscious Consumers are more likely to be drinking less alcohol when they eat out than are members of other groups.

More than half the Weight Conscious and Health Conscious Consumers prefer restaurants which make everything from scratch versus less than half for all consumers.

Most (over 70%) of the Weight Conscious Consumers report they would eat out more often if it was not so fattening.

Nearly six out of 10 Weight Conscious Consumers said they wish restaurants would offer more foods for people on restrictive diets.

Health Conscious and Weight Conscious people also want to see more restaurants offer items cooked without salt ... more than four out of 10 agreed versus one out of three for all consumers.

Uncommitted Consumers are not tired of hearing about alcohol is good and bad for them.

Only two out of 10 agreed with the statement compared to three out of 10 for all respondents.

Table II-31
Attitudes Toward Restaurants by Health and Nutrition Groups

Attitudinal Statement	Percent Saying Strongly Agree				
	Total Respondents	Traditional Consumers	Weight Conscious Consumers	Health Conscious Consumers	Uncommitted Consumers
You are tired of hearing about what's good and bad for you when it comes to food	31.1	38.4	28.1	29.3	19.4
You look for low fat foods when you eat out	21.4	8.8	43.1	19.5	14.4
You wish that more restaurants in your area offered menu items cooked without salt	33.6	18.3	54.6	40.5	27.8

Source: *Consumer Nutrition Concerns and Restaurant Choices*, National Restaurant Association, September 1986

Table II-32
Frequency of Purchasing Take Out Foods and Beverages by Type of Establishment

Frequency	All Establishments	Fast Food Places*	Table Service Restaurants*	Grocery Stores/ Supermarkets*	Convenience Stores*	Delis*
Frequent User (At least twice a month)	56.0%	58.1%	27.8%	29.2%	22.8%	14.4%
Occasional User (Once a month, or once every other month)	20.4	25.0	22.9	17.4	17.7	20.2
Infrequent User (Once every 6 months, once a year)	8.9	12.1	20.2	19.1	16.7	26.9
Non-user (Never purchases take out)	14.7	4.8	29.1	34.3	42.8	38.5

* Based only on those who purchase take out foods and beverages at least once a year

Source: *The Take Out Market*, National Restaurant Association, February 1986

Table II-32 Highlights

More than eight out of 10 people purchase a take out meal or snack at least once a year.
More than half purchase food to go more than twice a month.
Most people purchase take out foods and beverages from fast food places.
Six out of 10 people said they buy food to go from a quick service restaurant more than twice a month.

Table II-33
Frequency of Purchasing Take Out Foods and Beverages at All Types of Establishments

Demographic Characteristic	Frequent User	Occasional User	Infrequent User	Non-User
Sex				
Male	53.2%	20.9%	9.2%	16.7%
Female	58.3	20.1	8.7	12.9
Age				
Under 18	51.0%	17.3%	4.1%	26.6%
18–24	87.7	9.6	1.4	1.3
25–34	76.8	17.5	4.0	1.7
35–44	72.2	17.3	4.9	5.6
45–54	53.8	24.3	11.2	10.7
55–64	43.9	30.6	12.2	13.3
65 +	30.3	18.8	16.0	34.9
Family Composition				
Single	57.5%	20.4%	9.0%	13.1%
Married, no children	44.3	20.8	12.1	22.8
Family, youngest child:				
under 6	58.6	17.3	8.7	15.4
6–12	65.7	19.9	3.4	11.0
13–17	65.3	21.5	7.0	6.2
18 +	57.6	21.0	9.5	11.9
Region				
Northeast	54.7%	21.1%	9.1%	15.1%
Midwest	50.3	19.4	9.7	20.6
South	63.7	17.8	6.8	11.7
West	54.0	25.1	10.9	10.0
Female Employment				
Full time	69.2%	17.9%	6.3%	6.6%
Part time	58.1	26.9	8.8	6.2
Not employed	43.9	20.7	10.4	25.0

Table II-33 Highlights

The most likely users of meals and snacks to go are those who are most concerned with convenience and saving time.

Women, 18 to 34 years old, singles, families with teenagers and working women households frequently purchase take out meals and snacks.

Senior citizens, married couples with no children and households with a non-working wife or mother are less likely to purchase take out meals and snacks.

Table II-33
Frequency of Purchasing Take Out Foods and Beverages at All Types of Establishments

Demographic Characteristic	Frequent User	Occasional User	Infrequent User	Non-User
Household Income				
Under $10,000	48.1%	22.9%	8.4%	20.6%
$10,000–$14,999	57.6	15.8	6.8	20.8
$15,000–$19,999	51.0	29.0	7.0	13.0
$20,000–$24,999	65.2	16.5	7.0	11.3
$25,000–$34,999	57.5	21.0	10.3	11.2
$35,000–$49,999	65.6	14.5	11.3	8.6
$50,000 and over	45.4	26.4	10.9	17.3
Household Size				
One	57.5%	20.4%	9.0%	13.1%
Two	48.3	21.4	11.3	19.0
Three	59.9	20.3	9.4	10.4
Four	62.8	17.6	7.0	12.6
Five or more	60.3	22.3	3.3	14.0
Frequency of Eating Out				
4 or more times a month	65.6%	18.1%	6.7%	9.6%
2 or 3 times a month	58.7	19.6	8.5	13.2
Once a month	46.1	26.2	10.0	17.7
Once every other month	28.8	35.6	16.9	18.7
Once every 6 months/ once a year	25.0	20.0	23.3	31.7
Never	*	*	*	*
Total Respondents	56.0%	20.4%	8.9%	14.7%

* Sample size too small for analysis

Source: The Take Out Market, National Restaurant Association, February 1986

Table II-34
Foods Purchased for Last Take Out Meal

Food Item	Percent of Respondents
Hamburgers/cheeseburgers	39.0%
French fries	28.1
Other sandwiches/subs/hot dogs	22.7
Chicken	19.7
Pizza	17.1
Ice cream/yogurt	9.9
Fish/seafood	9.5
Donuts/pastry/croissant	8.2
Egg sandwich	6.6
Other salads (fruit/potato/chicken)	5.8
Tossed Salad	5.3
Barbecue	4.5
Oriental food	4.4
Baked potato	3.8
Mexican food	3.5
Cookies	3.2
Sausage sandwich	3.1
Eggs, any style	2.9
Soup	2.7
Other breakfast foods (toast/pancakes/bacon, etc.)	8.3
Other side dishes (beans/chips/vegetables, etc.)	1.9
All other mentions	2.1

Note: Will not total 100.0 percent because of multiple responses.

Source: *The Take Out Market*, National Restaurant Association, February 1986.

Table II-34 Highlights

Hamburgers and cheeseburgers are the most popular foods ordered for take out – four out of 10 purchased a cheeseburger or hamburger.

French fries were second in popularity, three out of 10 ordered french fries on their most recent take out occasion.

Other sandwiches, chicken, pizza and ice cream or yogurt are also popular take out foods.

Table II-35
Beverages Purchased for Last Take Out Meal

Beverage	Percent of Respondents
Soft Drinks	66.0%
Coffee	18.1
Milk	8.6
Tea	8.6
Fruit juice	4.9
Milkshake	3.7
All others	2.3

Note: Will not total 100.0 percent because of multiple responses.

Source: *The Take Out Market*, National Restaurant Association, February 1986.

Table II-35 Highlights

Soft drinks are the most popular beverage purchased for take out meals and snacks.

Coffee is the second most popular beverage followed by milk and tea.

Table II-36
Take Out Food Attitudes

	Percent Saying . . .			
	Agree	Neither Agree Nor Disagree	Disagree	Mean Value
The packaging for take out foods is adequate	71.8%	16.5%	4.8%	4.1
How far away the establishment is located is important to me when choosing a place to purchase a take out meal or snack	69.0	13.8	10.0	4.1
I prefer to take out food purchased at restaurants and fast food places to that purchased at grocery and convenience stores	60.9	20.9	11.2	3.9
The quality of take out food available from restaurants and fast food places has improved in the past three years	53.3	30.6	9.2	3.7
I prefer to go to establishments which offer a wide variety of take out items	52.6	28.0	12.6	3.7
I prefer to go to establishments which offer daily take out specials	37.1	41.8	14.4	3.4
I usually purchase a complete take out meal rather than only one or two items to go with a meal prepared at home	46.4	13.8	30.8	3.4
I would take advantage of drive-thru service if it were more readily available from restaurants and other places that serve food	42.6	25.8	24.3	3.3
I am purchasing more take out meals now than I did three years ago	46.6	16.4	29.9	3.3
Few, if more fancy restaurants offered take out service	27.0	42.4	23.5	3.1
I would take advantage of delivery service if it were more readily available from restaurants and other places that serve food	33.9	24.0	35.1	3.0
I would take advantage of complete, gourmet take out meals for my household and my guests if they were more readily available from specialty and atmosphere restaurants	27.4	22.2	43.3	2.7
I often have to reheat hot take out foods before I eat them	22.8	17.5	51.7	2.4

Source: *The Take Out Market*, National Restaurant Association, February 1986

Table II-37
Ethnic Foods Ordered in Restaurants

Ethnic Food	Percent Who Have . . . Eaten Only Once	Eaten More Than Once	Never Eaten
Italian	3%	91%	6%
Chinese	6	83	11
Mexican	8	80	12
German	12	53	35
French	10	49	41
Greek	15	41	44
Japanese	12	38	50
Spanish	8	34	58
British	7	30	63
Eastern European	8	29	63
Scandinavian	4	17	79
Indian	8	13	79
Other Oriental	6	15	79
Latin American	6	14	80
Middle Eastern	6	12	82
Russian	5	7	88
African	2	3	95

Source: Consumer Preferences for Ethnic Foods in Restaurants, National Restaurant Association, March 1984

Table II-37 Highlights

Italian cuisine is the most popular ethnic food in restaurants, with more than 9 in 10 having eaten it at least once.

Chinese and Mexican foods are the next most widely eaten, with more than eight out of 10 Americans having eaten them.

Russian and African foods are the least popular.

Table II-38
Frequency of Ordering Ethnic Foods in Restaurants

Ethnic Food	Percent of Respondents Who Order . . . Frequently	Occasionally	Infrequently
Italian	39.1%	45.3%	15.4%
Chinese	31.6%	43.3%	25.3%
Mexican	40.5%	37.1%	21.9%
German	6.6%	43.0%	48.9%
French	10.5%	47.2%	41.8%
Greek	8.5%	31.9%	59.9%
Japanese	13.1%	41.0%	45.9%
Spanish	20.4%	45.6%	33.9%
British	11.0%	37.2%	51.5%
Eastern European	10.9%	35.8%	53.3%
Scandinavian	6.9%	36.6%	54.9%
Indian	13.3%	23.8%	61.9%
Other Oriental	10.1%	38.7%	50.4%
Latin American	11.9%	39.5%	48.7%
Middle Eastern	11.1%	38.0%	48.4%
Russian*	5.8%	15.4%	78.9%
African*	9.1%	40.9%	50.0%

* Small sample size; use caution when interpreting the results.

Source: Consumer Preferences for Ethnic Foods in Restaurants, National Restaurant Association, March 1984

Table II-38 Highlights

Italian cuisine is the most popular ethnic food in restaurants, with more than 9 in 10 having eaten it at least once. Chinese, Mexican and German foods are the next most widely eaten, with more than eight out of 10 Americans having eaten them. Russian and African foods are the least popular.

Italian food is the ethnic food most frequently ordered by consumers, with almost one out of 10 restaurant customers ordering it at least once a month.

Table II-39
Proportion Who Order Ethnic Foods in Restaurants Once a Month or More Often*

Ethnic Food	
Italian	39%
Chinese	32
Mexican	40
German	7
French	10
Greek	8
Japanese	13
Spanish	20
British	11
Eastern European	11
Scandinavian	7
Indian	13
Other Oriental	10
Latin American	12
Middle Eastern	11
Russian	6
African	9

* Based only on those who have eaten the food at least once.

Source: Consumer Preferences for Ethnic Foods in Restaurants, National Restaurant Association, March 1984

Table II-39 Highlights

Four out of 10 eat Italian food in restaurants once a month or more often, and a similar proportion say the same for Mexican food.

Three out of 10 order Chinese food once a month or more often.

Fewer than one out of 10 are likely to order the following foods once a month or more often—German, Greek, Scandinavian, Russian and African.

Table II-40
Proportion Who Are Very Likely to Order Ethnic Food Again

Ethnic Food	Percent of Respondents		
	Total	Have Tried	Have Not Tried
Italian	68.0%	71.7%	10.5%*
Chinese	55.9%	61.6%	9.0%*
Mexican	51.7%	57.7%	7.6%*
German	30.6%	40.0%	13.4%
French	32.4%	45.0%	14.5%
Greek	22.2%	33.6%	7.4%
Japanese	28.4%	43.9%	12.8%
Spanish	26.7%	39.9%	17.0%
British	23.9%	35.1%	17.4%
Eastern European	17.8%	29.2%	11.4%
Scandinavian	18.7%	33.4%	14.9%
Indian	12.8%	27.1%	9.0%
Other Oriental	18.0%	42.4%	11.4%
Latin American	17.4%	33.3%	13.6%
Middle Eastern	13.5%	34.5%	8.7%
Russian	12.8%	19.0%*	11.6%
African	10.3%	32.6%*	9.1%

* Small sample size; use caution when interpreting results.

Source: *Consumer Preferences for Ethnic Foods in Restaurants*, National Restaurant Association, March 1984.

Table II-40 Highlights

Italian, Chinese and Mexican foods can be expected to maintain their popularity as the nation's favorite ethnic foods to enjoy in restaurants.

German, French, Greek and Japanese foods should also remain popular.

Most people who have tried these dishes will order them again.

Consumers are less likely to try the less popular ethnic foods again.

Among the dining out public who have not tried an ethnic food, there is a tendency not to want to try it in the future.

Table II-41
Ethnic Food Attitudes

Statement	Mean Value	Percent Who Agree
I would try more ethnic dishes if they were available at restaurants	6.8	47.3%
I wish more ethnic dishes were available at family style restaurants	6.8	44.4%
I like to try items I have never eaten before when I eat out	6.6	45.9%
I wish fast food places offered more ethnic items on their menus	6.0	36.5%
I am eating more ethnic foods at restaurants now than I did 3 years ago	5.6	35.4%
I like hot and spicy ethnic dishes	5.5	35.2%
Ethnic foods are difficult to prepare at home	5.4	28.2%

Source: *Consumer Preferences for Ethnic Foods in Restaurants*, National Restaurant Association, March 1984.

Table II-41 Highlights

Consumers would try more ethnic dishes if they were available in restaurants, even having restaurants to offer more ethnic menus and they like to try new items when they dine out.

Consumers would like to see more fast food places offer ethnic foods. Many feel that it is too difficult to prepare ethnic foods at home.

Table II-42
Specialty Restaurants Patronized

Specialty Establishment	Proportion of Adults Who Have Patronized in Past Three Months: 1985 %	1986 %	% Point Difference
Bakery items, such as croissants, muffins, cinnamon bars	na	49	—
Pizza delivery	40	47	+7
Barbecue	34	47	+13
Pasta	35	46	+11
Hot dogs	na	42	—
American regional cuisine	36	na	—
Hamburgers, with a wide variety of toppings and offers alcoholic beverages	33	34	+1
Premium, hand-dipped ice cream	32	34	+2
Oriental fast food	25	29	+4
Diet or lite menu items	26	29	+3
Freshly baked cookies	29	26	−3
Gourmet, ready-to-eat take out foods	18	21	+3
Marinated, broiled or Mexican style chicken	17	20	+3
Spicy, cajun-style cooking	14	18	+4
Display cooking in front of patrons	12	13	+1
Mesquite grilling	5	9	+4
Sushi or sashimi	7	5	−2

na = not asked

Source: Consumer Preferences for New Restaurant Concepts, National Restaurant Association, August 1986

Table II-43
Likelihood of Trying Specialty Restaurants, 1985 and 1986

Specialty Establishments	Proportion of Non-Patrons Very Likely to Try Establishment in Future: 1985 %	1986 %	% Point Difference
Premium, hand-dipped ice cream	37	39	+2
Barbecue	35	35	0
Freshly baked cookies	30	31	+1
Pasta	28	27	−1
American regional cuisine	27	na	—
Hamburgers with toppings and offers alcoholic beverages	24	22	−2
Pizza delivery	24	26	+2
Display cooking in front of patrons	22	21	−1
Oriental fast food	21	19	−2
Gourmet, ready-to-eat take out foods	20	22	+2
Diet/lite menu items	19	18	−1
Marinated, broiled or Mexican-style chicken	17	18	+1
Spicy, cajun-style cooking	16	15	−1
Mesquite grilling	12	14	+2
Sushi/sashimi	8	8	0
Bakery items such as croissants, muffins, cinnamon bars	na	26	—
Hot dogs	na	14	—

na = not asked

Source: Consumer Preferences for New Restaurant Concepts, National Restaurant Association, August 1986

Table II-44
Distribution of Occasion Types by Restaurant Type

	Total	Fast Food Hamburger	Other Fast Food	Cafeteria Buffet	Coffee Shop Under $3	Coffee Shop Over $3	Full Menu Under $7	Full Menu $7–$12	Full Menu $12 And Over
Fast and Inexpensive	16%	36%	32%	13%	23%	21%	11%	8%	3%
On Familiar Ground	12	6	19	11	41	15	21	8	3
Convenience For Me	12	15	12	19	9	16	11	8	—
Business/Social Obligation	12	10	6	13	18	17	14	13	21
Family Meal	16	25	19	24	4	16	10	4	—
A Special Night Out	15	3	4	8	5	10	21	28	26
Social Fun	18	4	8	11	—	5	12	22	47

	Steak/ Beef	Seafood	Theme/ Fern	Oriental	Mexican	Other Ethnic	Healthy/ Natural	Pizza
Fast and Inexpensive	7%	4%	9%	3%	8%	4%	16%	23%
On Familiar Ground	2	3	7	13	3	11	21	7
Convenience For Me	9	12	9	7	14	4	26	13
Business/Social Obligation	7	9	16	18	3	14	10	13
Family Meal	18	12	8	21	24	20	—	30
A Special Night Out	18	27	29	31	29	20	5	3
Social Fun	40	32	30	14	24	30	21	10

Source: *Consumer Restaurant Behavior: A View Based on Occasion Segmentation*, National Restaurant Association, October 1983.

Table II-45
Reasons for Eating Out By Occasion Type

Reason	Total Occasions	Fast And Inexpensive	On Familiar Ground	Convenience For Me	Business/ Social Obligation	Family Meal	A Special Night Out	Social Fun
Was simply convenient to eat out	6.6	8.2	7.6	7.8	6.3	7.3	6.1	3.4
Someplace to relax	6.0	4.4	6.9	6.7	6.2	5.2	8.2	5.5
Wanted to go to a familiar place	5.4	4.0	8.6	4.9	5.7	5.4	5.9	4.4
Go out and have a good time	5.4	2.1	3.3	5.6	4.5	5.3	8.1	7.8
Craving for a special particular food	5.2	3.4	7.2	5.0	4.3	5.1	5.9	5.4
Didn't feel like cooking	5.1	4.0	6.5	6.9	3.0	6.5	5.0	4.2
To eat inexpensively	4.9	6.5	5.6	5.4	4.4	5.8	4.3	2.4
Wanted to eat something nutritious	4.8	3.4	6.6	5.2	4.2	4.6	6.2	3.8
Routine	4.7	6.0	6.1	4.5	6.2	4.1	4.0	3.0
Something to eat fast	4.6	7.7	4.9	4.7	4.1	5.7	3.0	2.5
To sit and talk and not be bothered	4.6	2.4	3.8	5.6	6.1	3.1	7.4	4.7
Something nice for me	4.6	2.5	3.5	5.1	4.0	4.2	6.0	5.3
Something nice for someone else	4.4	1.4	2.9	2.4	4.0	6.8	7.2	6.2
Was hungry—unable to eat at home	4.3	7.6	4.3	4.0	4.6	4.5	3.3	2.0
I was meeting a friend or friends	4.1	1.9	1.9	4.7	7.3	1.8	3.5	7.3
Go where restaurant people know me	4.0	2.4	7.4	2.5	6.3	3.2	4.4	3.6
Wanted something really different	4.0	2.0	3.3	3.4	3.6	3.9	6.0	5.2
I was with a group of friends colleagues	3.9	2.8	1.8	2.6	7.3	2.1	2.3	7.0
Wanted to take people somewhere nice	3.8	1.5	2.2	2.1	3.4	3.5	6.3	6.3
A little vacation, to get away	3.5	1.6	2.1	4.5	2.3	4.0	5.5	4.1
Connected with another activity	3.3	2.6	2.8	3.6	2.3	3.8	3.4	3.1
For the fun of getting dressed up	3.0	1.1	1.7	1.8	1.6	2.3	5.8	5.6
A place where I'd see friends	2.9	1.7	2.6	2.4	5.3	2.1	2.9	3.2
Wasn't hungry, but felt I should eat	2.7	3.1	1.9	3.6	2.9	2.4	3.0	2.0
Go out with kids for family meal	2.7	1.1	1.4	1.9	1.2	7.8	2.2	2.7
Wanted an adventure	2.6	1.6	1.3	2.5	1.9	2.1	4.2	3.8
Felt like unwinding with a cocktail or beer	2.6	1.4	2.7	1.6	2.0	1.8	3.5	4.4

	Total Occasions	Fast And Inexpensive	On Familiar Ground	Convenience For Me	Business/ Social Obligation	Family Meal	A Special Night Out	Social Fun
Celebrate—birthday, promotion, etc.	2.5	1.2	1.2	1.8	2.2	2.1	3.4	4.8
It was a social obligation	2.5	1.3	1.2	1.8	5.2	1.3	2.4	3.9
It was a business obligation	2.4	1.8	1.8	1.2	7.1	1.2	1.3	2.5
To be alone in a romantic setting	2.1	1.2	1.3	1.5	1.3	1.5	6.2	2.7
I was bored	2.3	2.2	1.6	1.7	2.0	2.5	3.0	1.8
Stopped on impulse	2.0	2.7	1.7	2.6	1.6	2.2	2.0	1.4
The kids needed to eat	2.6	1.2	1.2	1.0	1.0	6.1	1.2	1.4
Wanted a good selection of wines/liquor	1.9	1.1	1.3	1.2	2.0	1.5	2.4	3.4

Note: 10 = Extremely important; 1 = Extremely unimportant

Source: *Consumer Restaurant Behavior: A View Based on Occasion Segmentation*, National Restaurant Association, Chicago, 1988

Table II-45 Highlights

Table II-46
Characteristics of the Occasion

Characteristic	Total Occasions	Fast And Inexpensive	On Familiar Ground	Convenience For Me	Business/ Social Obligation	Family Meal	A Special Night Out	Social Fun
Meal								
Breakfast	15%	12%	39%	12%	18%	12%	13%	4%
Lunch	42	64	36	49	66	34	20	30
Dinner	43	19	25	39	16	54	67	66
Number In Party								
One	17%	47%	46%	29%	7%	1%	4%	2%
Two	42	37	41	51	43	23	77	26
Three-Four	30	12	12	22	38	62	14	43
Five +	11	4	1	7	12	14	5	29
Presence of children under 18 in party	21%	5%	3%	7%	1%	86%	8%	19%
Average amount spent by the party for the meal	$24.32	$7.30	$13.71	$13.32	$22.90	$22.77	$22.43	$58.54
Average cost of respondent's own meal	$8.39	$4.05	$7.62	$5.33	$6.74	$6.70	$9.34	$13.01
Average amount spent on alcoholic beverages	$9.95	$6.60	$2.82	$4.42	$8.83	$4.45	$5.67	$17.50
Alcholic beverage ordered by someone in the party	27%	3%	15%	12%	30%	18%	47%	56%

Source: Consumer Restaurant Behavior: A View Based on Occasion Segmentation, National Restaurant Association, October 1984

Table II-47
Demographics by Occasion Type

Demographics	Total Occasions	Fast And Inexpensive	On Familiar Ground	Convenience For Me	Business/ Social Obligation	Family Meal	A Special Night Out	Social Fun
Age								
Under 25	13%	16%	4%	26%	14%	2%	14%	14%
25–34	32	38	27	18	27	48	29	32
35–49	26	20	29	19	37	33	24	22
50 and over	29	26	40	37	22	17	33	32
Sex								
Male	54%	73%	62%	47%	62%	38%	59%	41%
Female	46	27	38	53	38	62	41	59
Marital Status								
Single	19%	23%	26%	28%	18%	8%	21%	20%
Married	62	63	48	53	55	78	64	61
Widowed/divorced	19	14	32	19	27	14	15	19
Household Income								
Under $20,000	25%	29%	25%	35%	17%	18%	34%	22%
$20,000–$24,999	11	8	22	10	7	20	11	12
$25,000–$29,999	13	9	16	20	8	10	19	13
$30,000–$39,999	23	30	13	17	30	29	18	23
$40,000 and over	26	25	22	16	38	23	18	30
Occupation—Male Head Of Household								
Professional/managerial	48%	43%	61%	34%	57%	54%	43%	55%
Sales/clerical	15	20	15	18	12	10	15	14
Blue collar	21	19	18	20	18	30	22	16
Retired/unemployed/student	16	18	6	27	13	10	20	15

Source: Consumer Restaurant Behavior: A View Based on Occasion Segmentation, National Restaurant Association, October 1984.

Table II-48
Frequency of Use of Restaurant Promotions

Frequency of Use	All Promotions	Price Reduction*	Increased Portions*	Games and Sweep-stakes*	Premiums*
Four or more times a month	8.5%	7.8%	6.4%	5.8%	1.3%
Two or three times a month	14.7%	14.9%	9.6%	9.3%	2.3%
Once a month	17.4%	20.3%	16.0%	9.6%	4.7%
Once every other month	9.5%	15.0%	11.0%	7.2%	3.0%
Once every six months	13.1%	20.2%	17.6%	12.4%	11.0%
Once a year	8.5%	12.6%	14.0%	15.6%	25.3%
Never	28.3%	9.2%	25.4%	40.2%	51.6%

* Based only on those individuals who have taken advantage of a restaurant promotion in the past year.

Source: *Consumer Reaction to and Use of Restaurant Promotions*, National Restaurant Association, March 1982.

Table II-48 Highlights

Four out of 10 consumers will take advantage of a restaurant promotion at least once a month.

On the other hand, nearly three out of 10 never take advantage of restaurant promotions.

Price reduction promotions, including discounts, are the most popular. 91 percent take advantage of this type of promotion at least once a month and fewer than 10 percent never do so.

Table II-49
Likelihood of Use of Various Types of Restaurant Promotions and Incentives

Type of Promotion	Percent Saying . . . Very or Somewhat Likely to Use	Somewhat or Very Unlikely to Use	Mean Value
Two for one specials	60.3%	21.1%	3.7
Cents off coupons	52.8%	28.0%	3.4
Complete meal specials	37.2%	32.9%	2.9
All you can eat specials	38.3%	37.4%	2.9
Price reductions for mid-week dining	28.1%	43.9%	2.5
Introductory menu item promotions	21.6%	44.7%	2.4
Early bird specials	18.7%	53.8%	2.2
Games and sweepstakes	19.5%	54.3%	2.2
Premiums and non-food merchandise	15.8%	58.7%	2.0
Special events in restaurants	13.5%	58.1%	2.0
Senior citizen discounts	11.1%	67.5%	1.6

Mean value: 5 = very likely to use, 1 = very unlikely to use.

Note: Totals will not add to 100 percent due to exclusion of non-responses and those answering they are neither likely nor unlikely to use these promotions.

Source: *Consumer Reactions to and Use of Restaurant Promotions*, National Restaurant Association, March 1982.

Table II-49 Highlights

The types of restaurant promotions consumers are most likely to take advantage of include two for one specials and cents off coupons.

The types of restaurant promotions consumers are least likely to take advantage of include senior citizen discounts, special events and premiums.

Table II-50
Last Incentive Used

	Percent of Respondents
Type	
Increased portions	27.2%
Reduced prices	48.2
Premiums	9.0
Games	14.6
Other	1.6
Type of Restaurant	
Fast food/take out	60.8%
Family restaurant/coffee shop	21.0
Cafeteria	3.3
Fine dining	9.7
Meal Occasion	
Breakfast	4.8%
Lunch	20.6
Dinner	53.4
Snack	3.0
Aware of Incentive Before Going to Restaurant	
Yes	71.6%
No	13.3
Plan to Go Back to Restaurant	
Yes	84.0%
No	11.3

Note: Totals will not add to 100.0 percent because of exclusion of non-responses.

Source: *Consumer Reactions to and Use of Restaurant Promotions*, National Restaurant Association, March 1982.

Table II-50 Highlights

Consumers prefer promotions offering reduced prices to those offering increased portions.

Nearly half took advantage of a reduced price the when they last used an incentive versus about one-fourth who took advantage of an increased portion deal.

Other factors about the most recent deal used:
—Occurred at a fast food place.
—Used at dinner.
—Patron was aware of the incentive prior to the visit.

Table II-51
Attitudes About Incentives and Promotions

	Percent Saying . . .			
Statement	Agree	Neither Agree Nor Disagree	Disagree	Mean Value
I go to restaurants because of the food not because of incentives	70.1%	14.8%	5.9%	4.2
Often redeem coupons at grocery stores	61.7%	11.0%	17.0%	3.9
Noticed an increase in incentives at restaurants	53.8%	26.1%	10.1%	3.8
Incentives are usually good values	54.8%	26.1%	9.8%	3.7
Incentives reduce the cost of eating out	52.7%	22.0%	16.0%	3.6
Like to see more restaurants offer incentives	44.5%	34.3%	12.1%	3.6
Incentives increase costs of other products	50.2%	24.0%	15.9%	3.6
More incentives should be directed toward adults	40.2%	42.1%	8.3%	3.5
Like to take advantage of premiums, etc. offered by other stores	46.2%	23.9%	20.6%	3.4
Promotions encourage me to try new restaurants	37.2%	24.3%	29.0%	3.1
Taking advantage of restaurant promotions more often now than in the past	34.6%	21.0%	34.8%	2.9
Most promotions appeal to children	27.5%	28.7%	34.4%	2.9
Without promotions I would not be able to eat out as often	26.2%	21.9%	43.3%	2.7
Like to see restaurants do away with all promotions	10.7%	30.2%	49.5%	2.2

Source: *Consumer Reactions to and Use of Restaurant Promotions*, National Restaurant Association, March 1982.

Table II-51 Highlights

People usually go to a restaurant because of the food and not because of any incentive or promotion that is being offered.

Generally, consumers believe:
—There has been an increase in restaurant promotional offers.
—Incentives are good values.
—Restaurant promotions reduce the cost of eating out.
—They would like to see more restaurants offer incentives.

Table II-52
Weekly Household Food Away From Home Expenditures

Household Characteristics	1980–81		1982–83	
	Amount	Proportion**	Amount	Proportion**
All households	**$16.35**	**32.4%**	**$19.60**	**35.6%**
Age of household head				
Under 25	$12.49	42.8%	$15.34	47.4%
25–34	18.57	35.8	21.03	38.8
35–44	22.31	32.1	25.26	35.4
45–54	21.09	33.0	25.70	34.5
55–64	14.70	28.8	20.31	34.1
65 and older	8.47	24.3	10.37	27.4
Household income				
Less than $5,000	$7.06	26.5%	$8.92	34.9%
$5,000–$9,999	8.43	24.3	9.26	26.1
$10,000–$14,999	13.95	31.4	13.50	29.1
$15,000–$19,999	17.27	31.5	17.73	33.5
$20,000–$29,999	21.56	32.7	23.17	35.3
$30,000–$39,999	30.76*	37.7	28.56	38.0
$40,000 and over	na	na	40.65	42.7
Household Size				
One	$11.59	44.8%	$14.14	50.3%
Two	16.30	34.1	20.20	37.6
Three	17.80	31.0	19.53	31.4
Four	20.57	29.5	27.31	33.6
Five	21.78	27.5	24.58	28.0
Six or more	19.91	21.3	21.14	22.8
Region				
Northeast	$16.67	31.0%	$20.00	34.2%
Midwest	19.63	31.0	18.50	34.7
South	14.06	33.7	18.94	36.2
West	17.30	34.2	21.45	37.2

* Represents weekly expenditures for households with annual incomes of $30,000 or more
** Represents percent of food dollar spent away from home

Source: Consumer Expenditure Survey: Diary Survey, 1982–83, Bureau of Labor Statistics, 1985.

Section III

Characteristics of the Restaurant Occasion

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74 Changes in Menu Items Ordered

75 Per Person Check

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77 Promotion Usage

77 Where Food Is Eaten

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Frequency of Eating Out
Service Required
Price/Value Relationship
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Table III-1
Percent Change Customer Traffic, 1983–1985

	1983	1984	1985
All Restaurants	2.7%	4.0%	1.0%
Restaurant Type			
Quick Service	4.2	4.6	4.4
Midscale	1.0	2.5	-5.2
Upscale	5.4	4.3	1.8
Meal Occasion			
Breakfast	9.7	10.7	7.5
Lunch	0.8	3.5	0.7
Dinner	4.2	5.6	0.1
All Snacks	-0.6	-1.5	2.8

Source: CREST *Household Report*, Annual Data 1982–1985, CDR/CREST Enterprises

Table III-2
Percent Change in Restaurant Sales, 1983–1985

	1983	1984	1985
All Restaurants	5.3%	7.8%	3.1%
Restaurant Type			
Quick Service	9.2	10.1	4.4
Midscale	1.3	5.5	-5.2
Upscale	4.4	6.8	1.8
Meal Occasion			
Breakfast	13.4	13.3	7.4
Lunch	3.9	7.7	1.4
Dinner	5.9	8.1	3.0
All Snacks	-0.2	4.6	7.1

Source: CREST *Household Report*, Annual Data 1982–1985, CDR/CREST Enterprises

Table III-3
Percent Change in Average Check Size, 1983–1985

	1983	1984	1985
All Restaurants	2.2%	3.7%	2.1%
Restaurant Type			
Quick Service	4.7	4.9	3.4
Midscale	2.4	3.2	3.6
Upscale	0.6	2.4	3.6
Meal Occasion			
Breakfast	3.3	2.2	2.4
Lunch	2.8	4.1	2.3
Dinner	1.6	2.5	2.3
All Snacks	0.7	6.3	4.0

Source: CREST *Household Report*, Annual data 1982–1985, GDR CREST Enterprises.

Table III-4
Percent Change in Orders for Menu Items (1982–1985)

Item	Percent Change, 1982–1985
All breakfast foods	17.0%
breakfast sandwich	101.4
omelet	21.4
All sandwiches	n.c.
hamburgers	–3.6
cheeseburgers	–13.1
steak sandwich	32.5
fried fish sandwich	7.9
hotdog/sub	7.9
All beef	6.5
steak	14.5
prime rib/roast beef	7.5
Ham	4.1
Pork	13.7
Total fish/seafood	2.5
fried	3.6
not fried	51.1
Total chicken/poultry	16.2
fried	23.1
other	2.6
Pizza	32.3
thick crust	43.9
thin crust	24.2
Spaghetti	7.9
Other pasta	7.9
Mexican foods	34.7
Chinese/Oriental	25.0
Main dish salads	37.6
salad bar	89.0
French fries	4.2
Rice	36.7
Fruit	31.6
Total desserts	–1.9
Other desserts	11.6

Table continues

Table III-4
Percent Change in Orders for Menu Items (1982–1985)

Item	Percent Change, 1982–1985
Total non-alcoholic beverages	8.4
coffee	–6.2
decaffeinated coffee	100.4
regular cola	3.7
diet cola	43.0
non-diet, non-cola	52.4
diet non-cola	+32.5
shakes/malts	–5.1
milk	–9.6
juice	12.2

Source: CREST *Household Report*, Annual data 1982–1985, GDR CREST Enterprises.

Table III-5
Regional Food and Beverage Preferences

Regions	Food Items	Beverages
New England	1. Heroes/subs	1. Diet non-colas
	2. Fish (not fried)	2. Wine
	3. Salad sandwiches	3. Regular coffee
	4. Donuts/sweet rolls	4. Herb teas
	5. Sundaes	5. Juices
Mid Atlantic	1. Heroes/subs	1. Hot tea
	2. Salad sandwiches	2. Non-carbonated soda
	3. Veal	3. Decaffeinated coffee
	4. Other pasta	
	5. Frozen desserts	
East North Central	1. Chili	1. Decaffeinated coffee
	2. French toast	2. Regular coffee
	3. Cheese	3. Diet non-colas
	4. Roast beef	4. Shakes/malts
	5. Barbecued ribs	5. Hot chocolate
West North Central	1. Mashed potatoes	1. Hot chocolate
	2. Pan pizza	2. Medium colas
	3. Soft-serve ice cream	3. Milk
	4. Donuts/sweet rolls	4. Regular coffee
	5. Pancakes/waffles	5. Shakes/malts
South Atlantic	1. Breakfast sandwiches	1. Iced tea
	2. Fried shellfish	2. Large colas
	3. Non-fried shellfish	3. Medium colas
	4. Potato skins	4. Diet colas
	5. Chicken	5. Beer
East South Central	1. Vegetable platters	1. Iced tea
	2. Breakfast sandwiches	2. Regular colas
	3. Fried fish	3. Diet colas
	4. Other fried vegetables	
	5. Fried chicken	
West South Central	1. Enchiladas	1. Iced tea
	2. Nachos	2. Regular colas
	3. Other fried vegetables	3. Beer
	4. Tacos	4. Non-colas
	5. Burritos	
Mountain	1. Tacos	1. Non-carbonated sodas
	2. Burritos	2. Hot chocolate
	3. Enchiladas	3. Regular non-colas
	4. Chicken nuggets	4. Shakes/malts
	5. Ham and cheese	5. Milk
Pacific	1. Burritos	1. Wine
	2. Enchiladas	2. Hot chocolate
	3. Taco salads	3. Hot tea
	4. Tacos	4. Milk
	5. Chinese/Oriental foods	5. Beer

Source: CREST Marketing Services, NPD Research, 1982–84. Items shown here are those that rank above the U.S. average when a particular region is compared to that average.

Table III-6
Percent of Occasion on Which Promotions Are Used

	1982	1983	1984	1985
All Restaurants	10.1%	10.6%	10.6%	11.3%
Restaurant Type				
Quick Service	12.2	12.2	12.1	13.0
Midscale	7.3	8.2	8.1	8.5
Upscale	7.4	8.2	8.7	9.0
Meal Occasion				
Breakfast	8.1	9.0	8.7	9.5
Lunch	9.1	9.4	9.4	10.2
Dinner	14.2	14.4	14.5	15.3
All Snacks	5.8	6.3	6.2	7.1

Source: CREST *Household Report*, Annual data, 1982–1985 GDR/CREST Enterprises

Table III-7
Distribution of Promotions Used

	Coupons	Special Event	Reduced Price	Other
All Restaurants	42.3%	24.2%	12.3%	21.2%
Restaurant Type				
Quick Service	48.8	16.9	13.0	21.3
Midscale	27.0	44.0	11.0	18.0
Upscale	24.3	37.2	8.8	29.7
Meal Occasion				
Breakfast	30.8	34.7	12.1	22.4
Lunch	28.7	26.6	13.2	21.3
Dinner	49.0	20.6	10.8	19.6

Source: CREST *Household Report*, Annual Data 1985, GDR/CREST Enterprises

Table III-8
Proportion of Occasions Where Food Is Eaten

	Inside Eating Place	Take Out				Total Take Out
		At Work	In Car	At Home	Other	
All Restaurants	59.5%	6.1%	7.9%	18.9%	7.6%	40.5%
Restaurant Type						
Quick Service	43.0	7.9	11.8	27.4	9.8	57.0
Midscale	87.2	3.5	1.1	4.1	4.1	12.8
Upscale	94.5	0.8	0.1	2.6	1.9	5.5
Meal Occasion						
Breakfast	69.9	8.6	8.0	9.1	4.4	30.1
Lunch	65.3	9.8	7.5	10.5	6.9	34.7
Dinner	59.0	1.5	3.6	30.5	5.4	41.0
Snack	38.2	7.5	20.7	15.8	17.4	62.8

Source: CREST *Household Report*, Annual data 1985, GDR/CREST Enterprises

Table III-9
Proportion of Sales Where Food Is Eaten

	Inside Eating Place	Take Out				Total Take Out
		At Work	In Car	At Home	Other	
All Restaurants	72.2%	4.0%	4.0%	14.6%	5.2%	27.8%
Restaurant Type						
Quick Service	46.7	7.2	8.5	29.1	8.5	53.3
Midscale	91.2	2.0	0.4	3.3	3.1	8.8
Upscale	96.3	0.4	0.1	1.6	1.6	3.7
Meal Occasion						
Breakfast	80.8	4.8	5.5	5.1	3.7	19.1
Lunch	73.2	8.7	5.2	7.9	5.6	26.8
Dinner	73.6	1.0	1.8	19.5	4.0	26.4
Snack	46.7	5.9	13.4	19.2	14.8	53.3

Source: CREST *Household Report*, Annual data 1985, ©DR/CREST Enterprises

Table III-10
Proportion of Sales by Day of the Week

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
All Restaurants	10.3%	10.8%	11.3%	12.5%	16.0%	20.2%	18.3%
Restaurant Type							
Quick Service	11.0	11.2	12.2	12.9	18.0	19.6	14.1
Midscale	10.1	10.8	11.7	12.4	18.5	19.4	17.1
Upscale	9.0	10.0	11.7	11.9	19.6	22.6	15.1
Meal Occasion							
Breakfast	10.8	10.0	9.7	10.6	11.9	21.7	25.4
Lunch	12.4	12.9	14.1	14.0	15.9	16.5	15.2
Dinner	8.8	9.5	10.8	11.9	22.0	23.0	14.0
Snack	10.8	11.0	12.7	11.8	17.9	20.2	15.6

Source: CREST *Household Report*, Annual data 1985, ©DR/CREST Enterprises

Table III-11
Proportion of Traffic by Day of the Week

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
All Restaurants	11.2%	11.6%	12.5%	13.0%	18.1%	19.9%	14.5%
Restaurant Type							
Quick Service	11.6	11.7	12.8	13.1	18.1	19.1	13.9
Midscale	11.0	11.9	12.6	13.1	17.8	19.7	14.3
Upscale	9.7	10.8	11.2	12.8	19.0	20.4	16.2
Meal Occasion							
Breakfast	11.6	10.8	9.0	11.3	13.1	20.8	23.0
Lunch	13.0	13.4	14.0	13.9	19.0	16.2	10.5
Dinner	9.7	10.1	11.2	12.7	22.2	20.5	13.6
Snack	12.4	12.3	13.1	12.8	16.4	19.6	13.3

Source: 1988-91 Restaurant Report Projections, NPD CREST® Database

Table III-11 Highlights

Table III-12
Time Spent by Customers in Restaurants by Restaurant Type

Time Spent in Eating Place	All Restaurants	Fast Food	Cafeteria	Family	Upscale
10 minutes or less	14%	22%	10%	3%	2%
Up to 20 minutes	31	42	12	4	3
Up to 30 minutes	23	23	25	17	16
Up to 45 minutes	10	7	16	19	21
Up to one hour	18	5	33	31	46
More than one hour	4	2	4	27	12

Source: Gallup/NRA proprietary question, March 1992

Table III-12 Highlights

Table III-13
Consumer Satisfaction with Frequency of Eating Out

Year	Eating Out As Often As Would Like	Not Eating Out As Often As Would Like
1982	60.9%	39.7%
1983	62.2	37.1
1984	67.2	31.6
1985	70.3	29.3

Source: Gallup NRA proprietary question, August-September 1982, 1985

Table III-14
Consumer Service Ratings*

Service Required	Total	Breakfast	Lunch	Dinner
Items served as ordered	91.7%	90.5%	90.8%	92.5%
Hospitable and friendly service	91.6	87.8	89.4	94.0
Food served in a timely manner	89.2	86.1	90.0	91.1
Being greeted with a smile	88.9	77.0	89.2	93.1
Service staff was knowledgeable about the menu	80.9	75.2	79.6	84.2
Attentive service before, during and after meal	75.4	68.0	73.1	84.0
Service staff was knowledgeable about how menu items were prepared	68.3	66.2	69.9	72.1

* Represents proportion of respondents who rate restaurants that meet their expectations most of the time

Source: Gallup NRA proprietary question, August-September 1983

Table III-15
Consumer Rating of Restaurant Attributes

Rating	Price/Value	Food Quality	Service	Cleanliness
Excellent	16.2%	19.3%	24.1%	16.3%
Good	46.2	47.2	51.1	62.2
Fair	30.4	27.2	20.5	16.7
Poor	4.0	3.4	2.4	0.3
Very Poor	2.0	0.7	0.8	0.3

Source: Gallup NRA proprietary questions, 1982

Section IV

Restaurant Operations

82-83 Operating Ratios
Food Only Restaurants
Food and Beverage Restaurants

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85 Employee Benefits for Hourly Employees

Table IV-1
Statement of Income and Expenses for Food Only Restaurants

	Amount Per Seat			Ratio to Total Sales		
	Lower Quartile	Median	Upper Quartile	Lower Quartile	Median	Upper Quartile
Total Sales						
Total Cost of Sales						
Gross Profit						
Other Income						
Total Income						
Controllable Expenses						
Payroll						
Employee Benefits						
Direct Operating Expenses						
Music & Entertainment						
Advertising & Promotion						
Utilities						
Administrative & General						
Repairs & Maintenance						
Total Controllable Expenses						
Income Before Occupation Costs						
Occupation Costs						
Rent						
Property Taxes						
Other Taxes						
Property Insurance						
Income Before Interest & Depreciation						
Interest						
Depreciation						
Restaurant Profit						

Source: Restaurant Industry Operations Report ©

Table IV-2
Statement of Income and Expenses for Food and Beverage Restaurants

	Amount Per Seat			Ratio to Sales		
	Lower Quartile	Median	Upper Quartile	Lower Quartile	Median	Upper Quartile
Sales						
Food						
Beverage						
Total Sales						
Cost of Sales						
Food						
Beverage						
Total Cost of Sales						
Gross Profit						
Other Income						
Total Income						
Controllable Expenses						
Payroll						
Employee Benefits						
Direct Operating Expenses						
Music & Entertainment						
Advertising & Promotion						
Utilities						
Administrative & General						
Repairs & Maintenance						
Total Controllable Expenses						
Income Before Occupation Costs						
Occupation Costs						
Rent						
Property Taxes						
Other Taxes						
Property Insurance						
Income Before Interest & Depreciation						
Interest						
Depreciation						
Restaurant Profit						

Source: Restaurant Industry Operations Report, © National Restaurant Association and Deloitte and Touche, August 1988.

Table IV-3
Executive Compensation

	Base Salary		
	Lower Quartile	Median	Upper Quartile
Central Office:			
Chief Executive Officer	$37,000	$60,000	$ 90,000
Executive Vice President	30,667	50,000	100,000
Vice President of:			
Operations	30,000	41,800	53,500
Finance	30,750	36,000	58,750
Marketing	29,000	40,000	80,125
Personnel	24,000	36,512	42,288
Development	41,250	58,000	70,000
Franchising	*	30,000	*
Distribution Purchasing	25,000	34,125	52,875
General Counsel	*	40,000	*
Real Estate	30,000	45,361	67,000
Treasurer	18,000	31,000	43,000
Controller	25,000	33,000	37,000
Unit Level:			
Unit Manager	$18,000	$22,000	$ 24,000
Assistant Manager	12,000	16,000	21,000
Night Manager	12,000	16,000	18,000
Manager Trainee	13,000	15,000	15,000
Maitre d' Hostess	8,000	11,000	12,000
Headwaiter	8,000	10,000	12,000
Executive Chef	20,000	25,000	27,000
Chef	17,000	22,000	25,000
Head Bartender	10,000	12,000	15,000
Regional Level:			
Regional Manager - Operations	$28,000	$33,000	$ 35,000
Assistant Regional Manager - Operations	21,000	23,000	30,000
Regional Controller	*	32,000	*
Regional Marketing Director	*	41,000	*
Regional Manager - Distribution	*	27,500	*
Regional Personnel Director	*	29,000	*

* Insufficient number of positions contributing data

Source: *Executive Compensation and Benefits in the Foodservice Industry*, National Restaurant Association and Laventhol and Horwath, March 1985

Table IV-4
Benefits for Executive Employees

	Paid Completely	Paid Partially	Not at All
Pension Plan	15.7%	5.2%	79.1%
Stock Options	3.5	6.2	90.3
Profit Sharing	27.3	5.4	67.3
Savings Plan	1.1	6.0	93.0
Interest Free Loans	23.0	6.4	70.7
Financial Services (Broker Fees, Etc.)	3.3	3.0	93.7
Legal Services	7.0	8.0	85.0
Gift Contributions Matched	3.0	1.1	96.0
Survivor Benefits	21.5	9.7	68.8
Sick Leave	61.3	14.1	24.6
Sabbatical Leaves	1.6	5.9	88.5
Company Car	47.6	16.7	35.6
Professional Dues	55.6	11.4	33.1
Tuition Benefits	26.0	22.4	51.6
Professional Seminars	79.9	8.0	12.2
Company-Furnished Meals	29.0	11.5	9.6
Meals for Family	23.2	26.0	50.8
Housing	4.1	3.8	91.1
Moving Coverage			
Moving Expenses	28.5	10.1	61.2
Guaranteed Sales Price of Home	2.6	3.2	94.2
Company-Furnished Lodging	28.0	6.0	76.0
Travel & Entertainment Allowance	29.5	16.0	54.5
Periodic Medical Checkups	21.2	9.0	69.8
Insurance Coverage			
Business Travel Accident	47.8	6.8	45.5
Dental	25.5	13.4	61.2
Disability, Short Term	42.4	16.9	40.7
Disability, Long Term	39.1	13.8	46.2
Eye Care	20.0	8.4	72.6
Health and Accident	64.4	20.4	15.2
Health Maintenance Organization	19.7	7.0	73.3
Life	61.6	15.1	23.4
Major Medical (Deductible, Etc.)	66.4	20.0	13.7
Medical/Surgical	62.7	21.0	16.4
Prescription Plan	34.4	20.1	45.6

Note: Percentages represent percent of respondents who provide benefit.

Source: *Executive Compensation and Benefits in the Foodservice Industry*, National Restaurant Association and Laventhol and Horwath, March 1985

Table IV-5
Benefits for Hourly Employees

Benefit	Percent of Responding Companies Providing Benefit
Meals	95%
Uniforms	95
Paid vacation	95
Medical plan	95
Group life insurance	91
Paid holidays	91
Accidental death and dismemberment insurance	91
Paid leave for jury duty	90
Profit sharing/thrift savings plan	90
Paid sick leave	89
Paid leave for death in the family	89
Dental plan	85
Education assistance	79
Pension plan	78
Paid maternity leave	74
Stock purchase	52

Source: *A Foodservice Operator's Guide to Recruiting and Retaining Hourly Food Service Employees*, National Restaurant Association, 1987.

Section V

Industry Trends

87–88 Retail Sales

88–89 Menu Prices and Food Costs

89 Employment and Earnings

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96–103 Census of Retail Trade

Single and Multiunit Sales and Unit Counts

Eating Place Sales by State and Region

Eating Place Units by State and Region

Table V-1
Retail Sales, 1970–1985 (millions of dollars)

Year	Total Retail Sales	Eating And Drinking Place Sales	Eating Place Sales	Food Store Sales	Grocery Store Sales
1970	$ 368,403	$ 21,086	$ 25,301	$ 88,675	$ 81,516
1971	406,234	32,866	26,360	92,987	85,330
1972	449,069	36,180	29,772	99,035	91,695
1973	509,538	53,402	43,962	111,430	103,608
1974	540,988	43,613	36,108	125,355	117,199
1975	588,746	51,087	43,174	138,517	129,182
1976	657,375	57,217	48,078	149,372	138,172
1977	725,212	66,218	55,560	160,943	147,769
1978	806,775	81,724	69,092	173,654	163,630
1979	895,516	97,386	82,218	191,322	184,872
1980	959,561	99,624	80,291	218,301	205,136
1981	1,041,327	93,860	68,554	236,323	220,650
1982	1,072,065	104,429	84,351	235,336	230,192
1983	1,134,298	114,664	98,361	243,876	239,054
1984	1,241,062	124,541	114,603	270,430	254,242
1985	1,317,941	131,035	121,702	282,194	266,105

Notes: 1) Data Subject to revision 2) The sales figures presented here reflect the Retail Trade data series. They do not agree with National Restaurant Association figures for Eating and Drinking Places and Eating Places as explained on the following page. Source: U.S. Department of Commerce, Bureau of the Census.

Table V-2
Percent Change Retail Sales, 1971–1985

Year	Total Retail Sales	Eating And Drinking Place Sales	Eating Place Sales	Food Store Sales	Grocery Store Sales
1971	10.3	55.8	4.2	4.9	4.7
1972	10.5	10.1	12.9	6.5	7.4
1973	13.5	47.6	47.7	12.5	12.9
1974	6.2	-18.4	-17.9	12.5	13.2
1975	8.8	17.2	19.6	10.5	10.2
1976	11.6	12.0	11.4	7.8	7.0
1977	10.3	15.8	15.5	7.7	6.9
1978	11.2	23.4	24.4	7.9	10.7
1979	11.4	19.2	19.0	10.2	12.8
1980	6.7	2.3	-2.3	14.1	11.0
1981	8.5	-5.8	-14.6	8.3	7.6
1982	3.0	11.2	23.0	-0.4	4.3
1983	5.8	9.8	16.6	3.6	3.9
1984	10.1	8.6	16.5	10.9	6.4
1985	6.2	5.2	6.2	4.4	4.7
Compound Annual Growth					
1980–85	7.4	7.8	8.6	5.2	5.3

Table V-3
Monthly Eating and Drinking Place Sales 1983–1985 (Millions of dollars)

Month	1983	1984	1985
January	$ 8,365	$ 9,132	$ 9,550
February	8,098	9,161	9,327
March	9,290	10,130	10,813
April	9,507	10,179	10,843
May	9,813	10,608	11,560
June	9,983	10,895	11,514
July	10,430	11,093	11,673
August	10,331	11,540	11,979
September	9,843	10,562	10,987
October	10,009	10,480	11,307
November	9,396	10,133	10,754
December	9,625	10,608	10,728
Total	$114,664	$124,541	$131,035

Notes: 1) Data Subject to revision 2) The sales figures presented here reflect Retail Trade data series. They do not agree with National Restaurant Association data for the reasons stated on page 30.

Source: U.S. Department of Commerce, Bureau of the Census.

Table V-4
Proportion of Eating and Drinking Place Sales by Month 1983–1985

Month	1983	1984	1985
January	7.3%	7.3%	7.3%
February	7.1	7.4	7.1
March	8.1	8.1	8.3
April	8.3	8.2	8.3
May	8.6	8.5	8.8
June	8.7	8.8	8.8
July	9.1	8.9	8.9
August	9.0	9.3	9.1
September	8.6	8.5	8.4
October	8.7	8.4	8.6
November	8.2	8.1	8.2
December	8.4	8.5	8.2
Total	100.0%	100.0%	100.0%

Source: U.S. Department of Commerce, Bureau of the Census.

Table V-5
Monthy Eating Places Sales 1983–1985
(Miliions of dollars)

Month	1983	1984	1985
January	$ 7,603	$ 8,342	$ 8,702
February	7,385	8,080	8,586
March	8,307	9,274	9,964
April	8,626	9,389	10,012
May	8,699	9,514	10,104
June	9,113	10,080	10,648
July	9,062	10,239	10,918
August	9,016	9,972	11,144
September	9,009	9,958	10,598
October	9,101	9,901	10,431
November	8,501	9,258	9,995
December	8,771	9,775	9,998
Total	$101,981	$112,693	$120,225

Notes: 1) Data subject to revision 2) This table figures estimates based on March 1986 revisions. They do not agree with Nominal Restaurant Industry data for the reasons noted in Table III.

Source: U.S. Department of Commerce, Bureau of the Census

Table V-6
Proportion of Eating Place Sales by Month
1983–1985

Month	1983	1984	1985
January	7.2%	7.5%	7.2%
February	7.0	7.2	7.1
March	8.1	8.1	8.3
April	8.2	8.2	8.3
May	8.6	8.6	8.6
June	8.7	8.8	8.8
July	8.7	9.0	8.9
August	8.7	8.8	9.2
September	8.6	8.8	8.4
October	8.7	8.4	8.6
November	8.2	8.1	8.2
December	8.4	8.5	8.2
Total	100.0%	100.0%	100.0%

Source: U.S. Department of Commerce, Bureau of the Census

Table V-7
Consumer Price Index, 1970–1985

Year	All Items	Food At Home	Food Away From Home	All Items Less Food
1970	116.3	113.7	119.9	116.7
1971	121.3	116.4	126.2	122.1
1972	125.3	121.6	131.1	125.8
1973	133.1	141.4	141.4	130.7
1974	147.7	162.4	159.4	143.7
1975	161.2	175.8	174.3	157.1
1976	170.5	179.5	186.1	167.5
1977	181.5	186.2	200.3	178.4
1978	195.4	210.2	218.4	191.2
1979	217.4	232.9	242.9	213.0
1980	246.8	261.5	267.0	244.0
1981	270.6	269.9	291.0	270.6
1982	289.1	279.2	306.5	288.4
1983	298.4	292.2	319.9	298.3
1984	311.1	292.6	333.4	311.3
1985	322.2	296.6	346.6	323.3

Source: Bureau of Labor Statistics, Consumer Price Index

Table V-8
Percent Change Consumer Price Index, 1971–1985

Year	All Items	Food At Home	Food Away From Home	All Items Less Food
1971	4.3	2.4	5.2	4.6
1972	3.3	4.5	4.0	3.0
1973	6.2	16.3	7.8	3.9
1974	11.0	14.9	12.7	9.9
1975	9.1	8.3	9.3	9.3
1976	5.8	2.1	6.8	6.6
1977	6.5	6.0	7.6	6.5
1978	7.7	10.5	9.0	7.2
1979	11.3	10.8	11.2	11.4
1980	13.5	8.3	9.9	14.6
1981	9.6	7.3	9.0	10.9
1982	6.8	3.4	5.3	6.6
1983	3.2	1.1	4.4	3.4
1984	4.2	3.7	4.2	4.4
1985	3.6	1.4	3.9	3.8
Compound Annual Rate of Growth 1980–1985	5.5	3.4	5.4	5.8

Table V-9
NRA Food Cost Index and All Food, Producer Price Index 1970–1985

Year	NRA Food Cost Index	All Food, Producer Price Index
1970	N.A.	113.6
1971	119.4	116.5
1972	127.8	121.6
1973	154.4	146.3
1974	169.9	174.4
1975	186.1	189.0
1976	192.4	196.9
1977	199.6	200.8
1978	214.6	206.6
1979	240.8	226.2
1980	262.9	244.4
1981	269.3	251.9
1982	266.7	254.5
1983	265.6	252.4
1984	282.9	269.1
1985	276.7	264.9

Sources: Bureau of Labor Statistics, Producer Price Index; National Restaurant Association

Table V-10
Percent Change NRA Food Cost Index and All Food, Producer Price Index 1971–1985

Year	NRA Food Cost Index	All Food, Producer Price Index
1971	N.A.	2.7
1972	7.0	4.4
1973	20.8	20.3
1974	10.0	19.2
1975	9.6	8.4
1976	3.4	4.2
1977	3.8	2.0
1978	7.5	2.9
1979	12.2	9.5
1980	9.2	8.0
1981	2.4	3.1
1982	-0.9	1.0
1983	-0.4	-0.8
1984	6.5	6.6
1985	-2.2	-1.6
Compound Annual Rate of Growth, 1980–85	-0.7	1.6

Table V-11
Employment and Earnings for Eating and Drinking Places, 1970–1985

Year	Total Employment (Thousands)	Non-supervisory Employment (Thousands)	Average Hourly Earnings	Average Weekly Hours
1970	2,574.6	2,408.0	$1.86	31.2
1971	2,700.4	2,529.4	1.96	30.9
1972	2,869.2	2,673.7	2.07	30.4
1973	3,053.8	2,856.9	2.18	29.9
1974	3,237.2	3,017.9	2.37	29.5
1975	3,379.5	3,147.2	2.55	29.1
1976	3,696.2	3,407.3	2.69	28.5
1977	3,948.6	3,665.4	2.93	27.9
1978	4,297.2	3,946.1	3.22	27.1
1979	4,511.1	4,147.9	3.45	26.3
1980	4,629.8	4,256.4	3.69	26.1
1981	4,749.5	4,375.8	3.95	26.1
1982	4,861.2	4,444.7	4.09	26.2
1983	5,041.8	4,632.9	4.27	26.3
1984	5,403.3	4,967.8	4.33	26.3
1985	5,692.7	5,180.7	4.36	25.8

Note: Data subject to revision.
Source: Bureau of Labor Statistics, Employment and Earnings

Table V-12
Percent Change Employment and Earnings for Eating and Drinking Places, 1971–1985

Year	Total Employment	Non-supervisory Employment	Average Hourly Earnings	Average Weekly Hours
1971	4.9	4.9	6.4	(1.0)
1972	5.8	5.8	5.6	(1.6)
1973	6.8	6.9	5.2	(1.7)
1974	5.6	5.6	8.7	(1.2)
1975	4.6	4.1	7.6	(1.4)
1976	8.2	8.2	5.9	(2.1)
1977	8.0	7.6	6.3	(2.1)
1978	8.3	7.8	9.1	(2.0)
1979	6.5	6.5	7.1	(2.0)
1980	2.5	2.6	7.0	(0.8)
1981	2.7	2.6	8.2	(1.2)
1982	1.7	1.6	3.5	(0.4)
1983	4.4	4.2	4.5	(0.4)
1984	7.2	6.8	7.4	(0.6)
1985	5.5	4.7	6.1	(0.9)
1980–1985 Compound Annual Growth	4.2	4.0	5.8	(0.8)

Table V-13
Foodservice Occupational Employment Projections 1984–1995

Occupation	Employment (000) 1984	1995	Percent Change
Bread and pastry bakers	68	80	17.6%
Bartenders	400	512	28.0
Cooks and Chefs	1,309	1,594	21.8
Institutional or cafeteria	421	494	17.3
Restaurant	463	601	29.8
Short order and fast food	425	499	17.4
Food preparation and service workers: fast food	1,201	1,417	18.0
Food preparation and service workers other than fast food	987	1,205	22.1
Foodservice and lodging managers	657	746	13.5
Hosts/hostesses	132	168	27.3
Waiters/waitresses	1,625	2,049	26.1
Waiters assistants	307	381	24.1
All other foodservice workers	608	724	19.1
Total	7,294	8,876	21.7

Source: Bureau of Labor Statistics

Table V-14
Franchise Restaurant Sales (1969–1986*) Sales (000)

	Total	Percent Change	Company-Owned	Percent Change	Franchisee-Owned	Percent Change
1969	$ 3,790,126		$ 892,382		$ 2,897,744	
1970	4,502,111	27.4%	1,122,314	25.9%	3,479,797	20.1%
1971	5,844,950	27.0%	1,450,737	29.2%	4,394,219	26.3%
1972	6,797,405	16.3%	1,753,297	20.9%	5,044,108	14.8%
1973	8,534,094	25.5%	2,204,867	25.8%	6,329,243	25.5%
1974	10,350,567	21.3%	2,735,338	24.0%	7,615,229	20.3%
1975	12,267,364	18.5%	3,023,135	10.5%	9,244,163	21.4%
1976	14,606,313	19.1%	3,437,139	13.7%	11,169,174	20.8%
1977	18,180,404	24.5%	4,653,180	35.4%	13,527,244	21.1%
1978	21,100,788	16.1%	5,763,536	23.8%	15,337,243	13.4%
1979	24,766,416	17.4%	6,706,401	16.3%	18,059,915	17.7%
1980	27,867,046	12.5%	8,128,708	21.2%	19,737,338	9.3%
1981	30,042,348	7.8%	10,193,200	25.4%	19,849,142	0.6%
1982	31,696,236	5.5%	11,347,368	11.3%	20,348,868	2.5%
1983	38,691,594	22.1%	13,744,414	21.1%	24,947,180	22.6%
1984	43,433,782	12.2%	16,433,882	19.5%	27,000,900	8.2%
1985	48,088,573	10.7%	18,258,736	11.1%	29,829,837	10.5%
1986	53,809,508	11.9%	20,378,280	11.6%	33,431,228	12.1%

Number of Franchise Restaurant Establishments (1969–1986*)

	Total	Percent Change	Company-Owned	Percent Change	Franchisee-owned	Percent Change
1969	28,736		3,842		24,894	
1970	32,584	13.4%	4,998	30.1%	27,586	10.8%
1971	30,419	-6.6%	5,496	10.0%	24,923	-9.7%
1972	32,538	7.0%	6,319	15.0%	26,219	5.2%
1973	36,340	11.7%	8,316	31.6%	28,024	6.9%
1974	39,796	9.5%	10,115	21.6%	29,681	5.9%
1975	42,983	8.0%	11,685	15.5%	31,298	5.4%
1976	46,898	9.1%	12,562	7.5%	34,336	9.7%
1977	51,972	10.8%	14,527	15.6%	37,445	9.1%
1978	55,312	6.4%	15,510	10.2%	39,802	5.0%
1979	58,936	6.5%	16,884	8.8%	42,052	5.6%
1980	59,936	1.7%	17,620	5.6%	42,133	0.2%
1981	61,846	3.2%	19,355	8.6%	42,491	0.9%
1982	63,557	2.8%	19,857	2.6%	43,700	2.8%
1983	67,528	6.2%	21,785	9.7%	45,743	4.7%
1984	70,495	4.4%	22,951	5.3%	47,544	3.9%
1985	75,874	7.6%	24,580	7.1%	51,294	7.9%
1986	82,923	9.3%	26,664	8.5%	56,259	9.7%

* 1985 and 1986 estimated by respondents.

Source: U.S. Department of Commerce, Service Industries Division, *Franchising in the Economy*

Table V-15
Percentage of Total Franchise Restaurants By Type: Sales and Units (1980–1984)

1980

Type of Franchise	Firms Number	Firms %	Units Number	Units %	Sales Dollars (000)	Sales %
Chicken	35	8.2%	7,338	12.2%	$ 2,734,006	9.8%
Hamburger, frank., roast beef	110	25.9%	27,027	45.1%	14,027,398	50.3%
Pizza	63	14.8%	8,914	14.9%	2,456,542	8.8%
Mexican	32	7.5%	2,774	4.6%	878,523	3.2%
Seafood	12	2.8%	2,290	3.8%	786,806	2.8%
Pancake	17	4.0%	1,278	2.1%	784,546	2.8%
Steak/full menu	92	21.6%	8,888	14.8%	5,935,804	21.3%
Sandwich/other	54	8.7%	1,480	2.5%	265,421	1.0%
TOTAL	425	100.0%	59,989	100.0%	$27,867,046	100.0%

1981

Type of Franchise	Firms Number	Firms %	Units Number	Units %	Sales Dollars (000)	Sales %
Chicken	39	8.8%	7,382	11.9%	$ 2,833,007	9.4%
Hamburger, frank., roast beef	107	24.3%	26,945	43.6%	14,327,705	47.7%
Pizza	94	21.4%	9,608	15.5%	3,169,801	10.5%
Mexican	43	9.8%	3,002	4.8%	1,069,712	3.6%
Seafood	13	2.9%	2,226	3.6%	888,491	3.0%
Pancake	16	3.4%	1,560	2.4%	847,650	2.8%
Steak/full menu	109	24.8%	9,406	15.2%	6,566,702	21.9%
Sandwich/other	39	8.9%	1,664	2.7%	339,480	1.1%
TOTAL	440	100.0%	61,845	100.0%	$30,042,348	100.0%

1982

Type of Franchise	Firms Number	Firms %	Units Number	Units %	Sales Dollars (000)	Sales %
Chicken	32	7.0%	7,773	12.2%	$ 2,947,512	8.7%
Hamburger, frank., roast beef	102	22.3%	27,285	42.9%	16,862,890	50.0%
Pizza	106	23.2%	10,629	16.7%	3,740,072	11.1%
Mexican	33	7.2%	3,059	4.8%	1,258,054	3.7%
Seafood	14	3.0%	2,221	3.5%	909,265	2.7%
Pancake	15	3.3%	1,645	2.6%	893,625	2.7%
Steak/full menu	110	24.0%	9,135	14.4%	6,709,742	19.9%
Sandwich/other	46	10.0%	1,810	2.9%	375,138	1.1%
TOTAL	458	100.0%	63,557	100.0%	33,695,298	100.0%

Table V-15
Percentage of Total Franchise Restaurants By Type: Sales and Units (1980–1984)

1983

Type of Franchise	Firms Number	Firms %	Units Number	Units %	Sales Dollars (000)	Sales %
Chicken	34	7.3%	8,147	12.1%	$ 3,417,658	8.8%
Hamburger, frank., roast beef	98	21.0%	28,270	41.9%	18,947,637	49.0%
Pizza	111	23.8%	11,852	17.6%	4,649,022	12.0%
Mexican	39	8.4%	3,469	5.1%	1,681,668	4.3%
Seafood	11	2.4%	2,309	3.4%	938,261	2.4%
Pancake	12	2.6%	1,558	2.3%	838,291	2.2%
Steak/full menu	111	23.8%	9,849	14.6%	7,716,262	19.9%
Sandwich other	50	10.7%	2,074	3.1%	502,595	1.3%
TOTAL	466	100.0%	67,628	100.0%	$38,691,594	100.0%

1984

Type of Franchise	Firms Number	Firms %	Units Number	Units %	Sales Dollars (000)	Sales %
Chicken	33	7.1%	8,576	12.2%	$ 3,891,165	9.0%
Hamburger, frank., roast beef	105	22.6%	29,305	41.6%	22,043,955	50.7%
Pizza	104	22.4%	12,705	18.0%	4,932,329	11.3%
Mexican	36	7.7%	3,774	5.3%	2,113,104	4.8%
Seafood	12	2.6%	2,320	3.3%	1,074,426	2.5%
Pancake	13	2.8%	1,704	2.4%	985,350	2.3%
Steak/full menu	111	23.9%	9,563	13.6%	7,767,393	18.0%
Sandwich other	51	10.9%	2,548	3.6%	626,060	1.4%
TOTAL	465	100.0%	70,496	100.0%	$43,433,782	100.0%

Source: U.S. Department of Commerce, Service Industries Division, *Franchising in the Economy*

Table V-16
Principal Type of Service Provided By Franchise Restaurant Firms (1979–1984)

Self-Service, Drive-In and Drive-Thru

Major Activity	1979	1980	1981	1982	1983	1984
Chicken	30	32	27	29	32	30
Hamburger, etc.	104	103	100	96	93	101
Pizza	42	48	56	68	70	68
Mexican	18	23	24	22	24	22
Seafood	8	8	9	8	8	9
Pancake	0	0	0	0	0	0
Steak/full menu	20	19	19	18	18	17
Sandwich/other	30	31	38	42	46	47
TOTAL	252	264	273	278	291	294

Waiter or Waitress Service

Major Activity	1979	1980	1981	1982	1983	1984
Chicken	2	3	3	3	2	3
Hamburger, etc.	6	7	7	6	5	4
Pizza	31	36	36	36	41	36
Mexican	10	9	9	11	15	14
Seafood	3	4	4	11	3	3
Pancake	16	17	16	15	12	13
Steak/full menu	74	83	90	92	83	94
Sandwich/other	3	3	3	4	4	4
TOTAL	147	161	167	180	175	171

Source: U.S. Department of Commerce, Service Industries Division, *Franchising in the Economy*

Table V-17
Number of International Franchise Firms by Activity, 1980–1984

Major Activity	1980	1981	1982	1983	1984
Chicken	6	6	6	7	9
Hamburger	15	15	14	14	16
Pizza	8	9	10	15	14
Mexican	5	6	6	7	7
Seafood	4	4	3	3	3
Pancake	3	2	2	2	2
Steak/full menu	14	16	16	14	14
Sandwich/other	2	1	0	2	2
Total	57	59	57	64	67

Source: U.S. Department of Commerce, Service Industries Division, *Franchising in the Economy*

Table V-18
Number of International Franchise Units by Activity, 1980–1984

Major Activity	1980	1981	1982	1983	1984
Chicken	1,299	1,372	1,483	1,621	1,757
Hamburger	1,887	2,089	2,362	2,611	3,117
Pizza	263	289	410	496	533
Mexican	24	61	52	85	90
Seafood	67	68	93	76	71
Pancake	16	19	24	12	12
Steak full menu	396	425	442	470	481
Sandwich other	2	2	2	3	3
Total	3,944	4,325	4,675	5,516	6,065

Source: U.S. Department of Commerce, Service Industries Division, *Franchising in the Economy*

Table V-19
Number of International Franchise Units by Country, 1973–1984

Country	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984
Canada	1,082	860	940	1,047	1,074	1,196	1,383	1,221	1,220	1,172	1,539	1,591
Mexico	69	71	76	87	79	84	96	96	99	100	119	119
Caribbean	61	70	81	96	119	150	148	172	198	234	263	290
Europe:												
United Kingdom	375	429	408	433	421	454	494	511	442	481	542	576
Other	78	101	98	103	134	164	212	249	316	360	456	514
Australia	186	223	230	224	328	384	422	330	468	522	552	581
Asia:												
Japan	184	265	311	415	460	580	801	934	1,106	1,259	1,334	1,490
Other	31	41	43	53	64	120	149	201	230	276	365	431
Other[1]	81	109	195	162	170	198	218	217	246	271	347	398
Total	2,147	2,169	2,384	2,620	2,865	3,340	3,912	3,943	4,325	4,675	5,516	5,990

[1] Includes South America, Africa, New Zealand and Central America

Source: U.S. Department of Commerce, Service Industries Division, *Franchising in the Economy*

Table V-20
Single Unit and Multi-Unit Eating Place

1982

No. of Units	Firms	Percent of Firms	Units	Percent of Units	Sales (000)	Percent of Sales
1	169,546	96.7%	169,546	73.3%	$48,752,304	53.8%
2	4,217	2.2	8,434	3.3	4,168,951	4.6
3-9	5,411	2.8	14,777	5.7	8,186,170	9.0
10-24	849	0.5	12,987	5.1	4,763,082	5.2
25 or more	266	0.1	37,676	14.6	24,800,758	27.4
Total	180,088	100.0%	231,684	100.0%	$90,671,265	100.0%

1977

No. of Units	Firms	Percent of Firms	Units	Percent of Units	Sales (000)	Percent of Sales
1	182,901	96.6%	182,901	78.0%	$31,691,093	58.7%
2	3,510	1.8	7,020	3.0	2,371,212	4.5
3-9	2,662	1.5	12,803	5.4	4,566,804	8.7
10-24	556	0.2	5,210	2.2	2,022,936	3.8
25 or more	201	0.1	26,777	11.5	12,851,338	24.3
Total	189,812	100.0%	234,729	100.0%	$52,923,393	100.0%

1972

No. of Units	Firms	Percent of Firms	Units	Percent of Units	Sales (000)	Percent of Sales
1	171,702	96.7%	171,702	82.2%	$19,061,839	67.5%
2	3,429	1.9	6,858	3.3	1,324,211	4.7
3-9	2,147	1.2	9,172	4.4	1,996,479	7.1
10-24	225	0.1	3,441	1.6	(D)	N.A.
25 or more	142	0.1	17,525	8.5	4,162,281	14.7
Total	177,645	100.0%	208,698	100.0%	$28,224,277	100.0%

(D) Information withheld to avoid disclosure of data for individual companies.

Source: "Establishment and Firm Size," Census of Retail Trade, U.S. Department of Commerce, Bureau of the Census.

Table V-21
Single Unit and Multi-Unit Restaurant

1982

No. of Units	Firms	Percent of Firms	Units	Percent of Units	Sales (000)	Percent of Sales
1	104,403	97.6%	104,403	69.0%	$37,136,267	68.2%
2	1,581	1.4	3,162	2.1	1,662,425	4.1
3–9	642	0.6	2,552	2.0	2,864,230	6.2
10–24	229	0.2	3,619	1.4	1,969,114	4.0
25 or more	70	0.1	40,030	26.5	7,069,592	17.5
Total	106,964	100.0%	151,766	100.0%	$45,667,728	100.0%

1977

No. of Units	Firms	Percent of Firms	Units	Percent of Units	Sales (000)	Percent of Sales
1	104,993	98.0%	104,993	69.2%	$20,115,252	73.0%
2	1,257	1.2	2,514	1.7	1,128,648	4.1
3–9	709	0.7	2,656	1.8	1,756,143	6.4
10–24	92	0.1	1,661	1.1	940,670	3.4
25 or more	55	**	39,622	26.2	3,628,537	13.2
Total	107,097	100.0%	151,446	100.0%	$27,569,010	100.0%

1972

No. of Units	Firms	Percent of Firms	Units	Percent of Units	Sales (000)	Percent of Sales
1	103,066	98.1%	103,066	91.5%	$12,764,741	79.9%
2	1,286	1.2	2,576	2.3	634,832	4.0
3–9	629	0.6	2,788	2.5	914,058	5.7
10–24	77	**	1,161	1.0	484,683	3.0
25 or more	40	**	3,066	2.7	1,180,081	7.4
Total	105,110	100.0%	112,658	100.0%	$15,978,395	100.0%

** Less than 0.1 percent

Source: "Establishment and Firm Size," *Census of Retail Trade*, U.S. Department of Commerce, Bureau of the Census

Table V-22
Single Unit and Multi-Unit Refreshment Place Firms

1982

No. of Units	Firms	Percent of Firms	Units	Percent of Units	Sales (000)	Percent of Sales
1	70,367	84.2%	70,367	64.5%	$14,714,245	42.3%
2	2,369	2.8	4,860	4.5	1,928,157	5.5
3-9	2,230	2.7	9,833	9.0	4,684,987	13.5
10-24	393	.5	5,249	4.8	2,607,656	7.5
25 or more	149	.2	18,801	17.2	10,868,024	31.2
Total	83,447	100.0%	109,110	100.0%	$34,803,063	100.0%

1977

No. of Units	Firms	Percent of Firms	Units	Percent of Units	Sales (000)	Percent of Sales
1	63,093	94.0%	63,093	68.3%	$ 9,102,725	47.8%
2	526	2.7	3,052	3.0	1,004,544	5.3
3-9	1,601	2.8	8,466	8.2	2,515,887	13.2
10-24	213	0.3	3,243	3.5	1,034,190	5.4
25 or more	100	0.2	3,889	15.0	5,394,793	28.3
Total	67,113	100.0%	92,343	100.0%	$19,052,139	100.0%

1972

No. of Units	Firms	Percent of Firms	Units	Percent of Units	Sales (000)	Percent of Sales
1	56,146	34.3%	56,146	76.7%	$ 4,825,043	58.8%
2	1,622	2.8	3,244	4.4	479,102	5.8
3-9	1,188	2.0	5,005	6.9	845,006	10.3
10-24	105	0.2	1,682	2.2	282,893	3.5
25 or more	66	0.1	7,873	10.8	1,776,855	21.6
Total	58,127	100.0%	72,850	100.0%	$ 8,208,899	100.0%

Source: "Establishment and Firm Size: 1982, 1977, and 1972 Census of Retail Trade, U.S. Department of Commerce, Bureau of the Census.

Table V-23
Eating Place Sales by State & Restaurant Type

	Number of Establish-ments 1982	Percent Change 1977–1982	Sales (000) (1982)	Percent Change 1977–1982	Avg. Ann. Increase In Sales
New England					
Connecticut					
Restaurants & lunchrooms	1,953	11.5%	$ 744,923	83.5%	12.9%
Refreshment places	1,317	7.3	390,326	66.1	10.7
Cafeterias	90	(5.3)	10,182	(20.0)	(4.5)
Other	514	(0.4)	162,507	30.2	5.4
Maine					
Restaurants & lunchrooms	831	9.5%	$ 226,487	64.6%	10.5%
Refreshment places	527	1.9	140,988	64.6	10.5
Cafeterias	26	(23.5)	3,020	24.1	4.4
Other	147	10.5	26,838	58.3	9.6
Massachusetts					
Restaurants & lunchrooms	3,547	12.8%	$1,677,185	89.1%	13.6%
Refreshment places	2,535	2.9	746,982	72.5	11.5
Cafeterias	165	(1.8)	27,327	35.5	6.3
Other	814	(12.7)	359,923	45.5	7.8
New Hampshire					
Restaurants & lunchrooms	743	5.7%	$ 255,366	79.1%	12.4%
Refreshment places	409	0.2	115,527	57.1	9.5
Cafeterias	38	(2.6)	6,094	102.3	15.1
Other	127	33.7	30,238	71.4	11.4
Rhode Island					
Restaurants & lunchrooms	680	9.7%	$ 214,318	66.4%	10.7%
Refreshment places	442	17.9	107,089	77.8	12.2
Cafeterias	19	26.7	4,272	75.3	11.9
Other	97	5.8	31,499	31.2	5.6
Vermont					
Restaurants & lunchrooms	485	10.0%	$ 124,608	76.2%	12.0%
Refreshment places	226	22.8	52,611	89.4	13.6
Cafeterias	7	(65.0)	1,893	(51.4)	(13.5)
Other	61	17.3	19,002	50.2	8.5
Middle Atlantic					
New Jersey					
Restaurants & lunchrooms	3,630	2.6%	$1,506,008	61.3%	10.0%
Refreshment places	2,939	10.1	805,442	59.0	9.7
Cafeterias	122	(22.3)	36,478	41.7	7.2
Other	966	3.1	341,616	72.8	11.6
New York					
Restaurants & lunchrooms	10,684	(2.8)%	$3,760,589	57.2%	9.5%
Refreshment places	6,958	8.6	1,798,735	55.6	9.2
Cafeterias	344	(24.9)	93,049	21.4	4.0
Other	2,121	(6.2)	974,432	58.0	9.6
Pennsylvania					
Restaurants & lunchrooms	5,553	(1.5)%	$1,963,643	57.1%	9.5%
Refreshment places	4,654	13.3	1,369,108	68.0	10.9
Cafeterias	179	(38.1)	54,812	(2.6)	(0.5)
Other	1,281	(0.2)	414,142	57.1	9.5
East North Central					
Illinois					
Restaurants & lunchrooms	5,945	(1.6)%	$2,340,689	45.4%	7.8%
Refreshment places	5,152	10.5	1,768,720	60.0	9.9
Cafeterias	188	(30.1)	65,438	6.0	1.2
Other	1,170	(3.9)	393,415	31.7	5.7

Table V-23
Eating Place Sales by State & Restaurant Type (Continued)

	Number of Establish-ments 1982	Percent Change 1977–1982	Sales (000) (1982)	Percent Change 1977–1982	Avg. Ann. Increase In Sales
Indiana					
Restaurants & lunchrooms	2,705	1.4%	$ 912,029	55.4%	9.2%
Refreshment places	2,800	12.4	969,389	70.4	11.2
Cafeterias	214	(18.0)	101,527	56.9	9.4
Other	494	4.4	113,934	36.2	6.4
Michigan					
Restaurants & lunchrooms	4,507	(1.4)%	$1,746,595	45.7%	7.8%
Refreshment places	3,779	13.8	1,281,013	65.3	10.6
Cafeterias	129	(35.5)	54,776	(7.2)	(1.5)
Other	930	3.6	271,948	43.5	7.5
Ohio					
Restaurants & lunchrooms	4,928	(4.0)%	$1,971,958	50.2%	8.5%
Refreshment places	5,247	14.3	1,806,519	71.5	11.4
Cafeterias	222	(7.1)	97,650	38.9	6.8
Other	1,205	(6.2)	286,506	34.6	6.1
Wisconsin					
Restaurants & lunchrooms	3,356	5.0%	$1,059,422	55.8%	9.3%
Refreshment places	2,002	18.5	597,019	79.1	12.4
Cafeterias	63	3.3	17,232	66.7	10.8
Other	374	1.1	98,807	44.5	7.6
West North Central					
Iowa					
Restaurants & lunchrooms	1,917	(3.4)%	$ 463,348	37.4%	6.6%
Refreshment places	1,465	10.3	404,921	72.8	11.6
Cafeterias	77	(24.5)	36,550	27.5	5.0
Other	281	22.2	48,873	61.1	10.0
Kansas					
Restaurants & lunchrooms	1,407	(5.7)%	$ 371,468	58.4%	9.6%
Refreshment places	1,418	8.6	433,532	72.6	11.5
Cafeterias	71	9.2	31,767	77.1	12.1
Other	205	20.6	45,665	34.7	6.1
Minnesota					
Restaurants & lunchrooms	2,386	1.5%	$ 925,919	60.8%	10.0%
Refreshment places	1,750	20.7	508,514	75.1	11.9
Cafeterias	63	(32.2)	15,954	20.7	3.8
Other	368	19.1	105,438	97.7	14.6
Missouri					
Restaurants & lunchrooms	2,546	(2.5)%	$ 832,753	49.3%	8.3%
Refreshment places	2,434	14.6	814,851	73.7	11.7
Cafeterias	198	(5.3)	76,362	28.6	5.2
Other	428	(1.6)	134,328	52.0	8.7
Nebraska					
Restaurants & lunchrooms	1,008	(2.4)%	$ 294,153	45.6%	7.8%
Refreshment places	819	24.8	233,845	78.4	12.3
Cafeterias	38	(20.8)	14,688	40.2	7.0
Other	124	(5.3)	25,310	36.2	6.4
*North Dakota**					
Restaurants & lunchrooms	445	(0.9)%	$ 125,986	51.0%	8.6%
Refreshment places	302	22.8	91,315	121.8	17.3
Cafeterias	15	(42.3)	4,415	N/A	N/A
Other	44	(8.3)	7,811	N/A	N/A
South Dakota					
Restaurants & lunchrooms	528	(12.4)%	$ 132,277	39.3%	6.9%
Refreshment places	343	22.1	75,624	89.9	13.7
Cafeterias	15	(21.0)	5,553	89.4	13.6
Other	55	1.8	9,313	39.3	6.9

South Atlantic					
*Delaware**					
Restaurants & lunchrooms	323	9.9%	$ 122,366	65.9%	10.7%
Refreshment places	282	13.7	100,879	80.7	12.6
Cafeterias	12	(45.4)	2,635	N/A	N/A
Other	56	(23.3)	15,281	N/A	N/A
District of Columbia					
Restaurants & lunchrooms	449	(3.4)%	$ 270,503	46.5%	7.9%
Refreshment places	327	4.5	127,650	62.2	10.2
Cafeterias	56	(16.4)	20,557	(4.4)	(1.0)
Other	132	9.1	100,247	55.2	9.2
Florida					
Restaurants & lunchrooms	5,942	21.0%	$2,791,096	90.1%	13.7%
Refreshment places	5,051	32.9	1,825,817	110.6	16.2
Cafeterias	312	(5.7)	218,896	70.0	11.2
Other	787	40.8	324,288	107.0	15.7
Georgia					
Restaurants & lunchrooms	2,272	6.1%	$ 821,887	77.0%	12.1%
Refreshment places	2,818	21.7	1,072,381	92.8	14.0
Cafeterias	186	(11.8)	93,776	41.2	7.2
Other	350	22.8	136,981	86.0	13.2
Maryland					
Restaurants & lunchrooms	1,698	4.6%	$ 790,801	67.8%	10.9%
Refreshment places	1,977	17.4	710,909	55.6	9.2
Cafeterias	70	(34.0)	44,644	12.1	2.3
Other	414	(15.2)	197,501	65.8	10.6
North Carolina					
Restaurants & lunchrooms	2,875	5.1%	$ 791,931	67.5%	10.9%
Refreshment places	2,845	20.6	1,055,191	107.2	15.7
Cafeterias	145	(19.9)	81,421	37.4	6.6
Other	362	5.8	109,522	58.6	9.7
South Carolina					
Restaurants & lunchrooms	1,398	9.0%	$ 392,522	73.2%	11.6%
Refreshment places	1,493	28.5	526,033	107.8	15.8
Cafeterias	92	17.9	49,237	119.6	17.0
Other	167	4.4	72,365	79.5	12.4
Virginia					
Restaurants & lunchrooms	2,717	0.8%	$ 912,987	73.4%	11.6%
Refreshment places	2,458	15.2	916,377	83.8	13.0
Cafeterias	209	(29.4)	73,046	26.9	4.9
Other	371	2.5	166,900	52.3	8.8
West Virginia					
Restaurants & lunchrooms	700	(11.7)%	$ 186,061	39.2%	6.8%
Refreshment places	784	22.5	263,849	94.5	14.2
Cafeterias	32	(36.0)	15,986	19.7	3.7
Other	133	(26.5)	28,611	19.6	3.7
East South Central					
Alabama					
Restaurants & lunchrooms	1,183	(13.3)%	$ 334,609	34.8%	6.1%
Refreshment places	1,658	13.1	582,548	91.3	13.9
Cafeterias	87	(34.1)	50,612	32.3	5.8
Other	216	(11.8)	68,414	26.0	4.7
Kentucky					
Restaurants & lunchrooms	1,323	(11.1)%	$ 416,106	43.8%	7.5%
Refreshment places	1,696	24.7	637,473	91.1	13.8
Cafeterias	111	(38.0)	39,502	26.8	4.9
Other	209	1.4	65,278	70.5	11.3
Mississippi					
Restaurants & lunchrooms	847	(4.7)%	$ 213,151	70.4%	11.3%
Refreshment places	1,006	16.4	302,408	76.2	12.0
Cafeterias	54	17.4	25,003	145.5	19.7
Other	135	11.6	34,418	6.7	1.3

Table V-23
Eating Place Sales by State & Restaurant Type (Continued)

	Number of Establish-ments 1982	Percent Change 1977–1982	Sales (000) (1982)	Percent Change 1977–1982	Avg. Ann. Increase In Sales
Tennessee					
Restaurants & lunchrooms	1,968	(6.9)%	$ 682,084	60.8%	10.0%
Refreshment places	2,116	17.0	744,718	89.4	13.6
Cafeterias	159	(4.2)	73,605	64.3	10.4
Other	320	19.0	89,677	65.5	10.6
West South Central					
Arkansas					
Restaurants & lunchrooms	959	(13.4)%	$ 215,125	46.0%	7.9%
Refreshment places	1,182	15.1	335,653	92.1	13.9
Cafeterias	84	5.0	31,519	82.7	12.8
Other	115	(5.7)	22,809	35.2	6.2
Louisiana					
Restaurants & lunchrooms	1,633	2.1%	$ 636,993	81.2%	12.6%
Refreshment places	1,803	21.3	706,196	106.8	15.6
Cafeterias	85	(26.1)	70,228	46.2	7.9
Other	248	19.8	248,056	155.8	21.0
Oklahoma					
Restaurants & lunchrooms	1,579	(4.2)%	$ 516,922	90.5%	13.8%
Refreshment places	1,968	13.0	649,139	120.1	17.1
Cafeterias	139	0.7	79,056	86.6	13.3
Other	244	12.4	102,478	105.2	15.5
Texas					
Restaurants & lunchrooms	6,727	7.1%	$2,860,967	106.0%	15.6%
Refreshment places	8,534	21.1	2,898,421	106.9	15.7
Cafeterias	616	3.2	504,915	86.8	13.3
Other	968	17.6	464,576	116.9	16.7
Mountain					
Arizona					
Restaurants & lunchrooms	1,600	11.3%	$ 688,765	89.2%	13.6%
Refreshment places	1,464	37.0	452,769	108.9	15.9
Cafeterias	87	6.1	49,856	75.8	11.9
Other	228	25.3	84,298	28.0	5.0
Colorado					
Restaurants & lunchrooms	2,296	11.3%	$ 957,301	95.5%	14.3%
Refreshment places	1,542	24.0	525,842	106.0	15.6
Cafeterias	116	(12.1)	64,342	78.4	12.3
Other	254	23.9	121,420	82.8	12.8
Idaho					
Restaurants & lunchrooms	597	3.5%	$ 175,718	45.1%	7.7%
Refreshment places	506	16.6	121,126	56.8	9.4
Cafeterias	26	23.8	7,589	85.6	13.2
Other	59	25.5	19,002	96.2	14.4
Montana					
Restaurants & lunchrooms	690	8.5%	$ 185,476	53.6%	9.0%
Refreshment places	496	21.6	109,971	80.0	12.5
Cafeterias	20	5.3	8,129	161.0	21.0
Other	47	2.2	9,473	62.8	10.2
Nevada					
Restaurants & lunchrooms	519	17.4%	$ 261,435	78.3%	12.3%
Refreshment places	474	43.6	159,596	103.3	15.2
Cafeterias	23	27.8	3,776	51.6	8.7
Other	69	68.3	49,057	307.8	32.0

New Mexico					
Restaurants & lunchrooms	827	9.7%	$ 272,270	84.0%	13.0%
Refreshment places	751	25.2	234,837	106.4	15.6
Cafeterias	34	(15.0)	32,957	80.4	12.5
Other	93	36.8	23,968	60.8	10.0
Utah					
Restaurants & lunchrooms	705	(11.5)%	$ 232,533	47.4%	8.1%
Refreshment places	699	9.4	213,464	81.0	12.6
Cafeterias	18	(40.0)	3,869	24.4	4.5
Other	91	28.2	28,178	138.0	18.9
Wyoming					
Restaurants & lunchrooms	358	10.8%	$ 122,474	76.7%	12.1%
Refreshment places	303	37.1	89,149	128.8	18.0
Cafeterias	6	(62.5)	1,825	(11.5)	(2.5)
Other	27	125.0	14,638	641.9	49.0
Pacific Region					
Alaska					
Restaurants & lunchrooms	282	15.6%	$ 142,025	90.0%	13.7%
Refreshment places	217	41.8	102,724	116.5	16.7
Cafeterias	8	(57.9)	1,744	(47.0)	(12.0)
Other	36	(45.4)	81,415	25.1	4.6
California					
Restaurants & lunchrooms	15,207	9.1%	$7,164,561	67.4%	10.9%
Refreshment places	13,244	22.6	4,341,897	85.9	13.2
Cafeterias	727	(4.3)	254,579	48.7	8.3
Other	1,878	19.0	763,102	115.5	16.6
Hawaii					
Restaurants & lunchrooms	773	21.7%	$ 466,188	86.1%	13.3%
Refreshment places	545	21.6	262,001	89.7	13.7
Cafeterias	26	(7.1)	9,588	69.8	11.1
Other	97	16.9	71,738	109.7	16.0
Oregon					
Restaurants & lunchrooms	1,868	6.6%	$ 671,721	50.1%	8.5%
Refreshment places	1,498	30.1	429,242	76.1	12.0
Cafeterias	94	5.6	33,082	78.3	12.3
Other	193	13.5	60,419	88.9	13.6
Washington					
Restaurants & lunchrooms	2,752	14.0%	$1,189,218	61.7%	10.1%
Refreshment places	2,098	36.0	667,363	91.4	13.9
Cafeterias	112	(11.8)	35,747	17.0	3.2
Other	246	20.6	128,656	129.2	18.1

* The sales data for cafeterias and other establishments was not reported for Delaware and North Dakota in 1977 in order to avoid disclosing data for individual companies.

Source: 1982 Census of Retail Trade, Bureau of the Census, U.S. Department of Commerce

Section VI

Major Economic Indicators

105–106 Economic Indicators
Current Dollars
Constant Dollars

107 Total Employment

107 Unemployment Rate

107 Percent of All Women in the Labor Force

Table VI-1
Major Economic Indicators (Current Millions of Dollars)

	Gross National Product	Disposable Personal Income	Personal Consumption Expenditures			
			Total	Durables	Non-durables	Services
1970	$1,015.5	$ 715.6	$ 640.0	$ 85.7	$270.3	$ 284.0
1971	1,102.7	776.8	691.6	97.6	283.3	310.7
1972	1,212.8	839.6	757.6	111.2	305.1	341.3
1973	1,359.3	949.8	837.2	124.7	339.6	373.0
1974	1,472.8	1,038.4	916.5	123.8	380.9	411.9
1975	1,598.4	1,142.8	1,012.8	135.4	416.2	461.2
1976	1,782.8	1,252.6	1,129.3	161.5	452.0	515.9
1977	1,990.5	1,379.3	1,257.2	184.5	490.4	582.3
1978	2,249.7	1,551.2	1,403.5	205.6	541.8	656.1
1979	2,508.2	1,729.3	1,566.8	219.0	613.2	734.6
1980	2,732.0	1,918.0	1,732.6	219.3	681.4	831.9
1981	3,052.6	2,127.6	1,915.1	239.9	740.6	934.7
1982	3,166.0	2,261.4	2,050.7	252.7	771.0	1,027.0
1983	3,401.6	2,425.4	2,229.3	289.6	817.0	1,122.7
1984	3,774.7	2,670.2	2,423.0	331.1	872.4	1,219.6
1985	3,989.1	2,800.7	2,582.1	361.1	912.3	1,308.8

Note: Subject to revision. *Source:* Bureau of Economic Analysis, U.S. Department of Commerce

Table VI-2
Percent Change in Major Economic Indicators (Current dollars)

	Gross National Product	Disposable Personal income	Personal Consumption Expenditures			
			Total	Durables	Non-durables	Services
1971	8.6%	8.6%	8.1%	13.9%	4.8%	9.4%
1972	10.0	8.1	9.5	13.9	7.7	9.8
1973	12.1	13.1	10.5	12.1	11.3	9.3
1974	8.3	9.3	9.5	−0.7	12.2	10.4
1975	8.5	10.0	10.5	9.4	9.3	12.0
1976	11.5	9.6	11.5	19.3	0.6	11.9
1977	11.6	10.1	11.3	14.2	8.5	12.9
1978	13.0	12.5	11.6	11.4	10.5	12.7
1979	11.5	11.5	11.6	6.5	13.2	12.0
1980	8.9	10.9	10.6	0.1	11.1	13.2
1981	11.7	10.9	10.5	9.4	8.7	12.4
1982	3.7	6.3	7.1	5.3	4.2	9.9
1983	7.4	7.2	8.7	14.6	6.0	9.3
1984	11.0	10.1	8.7	14.3	6.8	8.6
1985	5.7	4.9	6.6	9.1	4.6	7.2

Source: Bureau of Economic Analysis, U.S. Department of Commerce

Table VI-3
Major Economic Indicators (Constant 1982 Dollars)
(Millions of dollars)

	Gross National Product	Disposable Personal Income	Personal Consumption Expenditures			
			Total	Durables	Non-durables	Services
1970	$2,416.2	$1,668.1	$1,492.0	$162.5	$632.5	$ 697.0
1971	2,484.8	1,728.4	1,538.8	178.3	640.3	720.2
1972	2,608.5	1,797.4	1,621.9	200.4	665.5	756.0
1973	2,744.1	1,916.3	1,689.6	220.3	683.2	786.1
1974	2,729.3	1,896.6	1,674.0	204.9	666.1	803.1
1975	2,695.0	1,931.7	1,711.9	205.6	676.5	829.8
1976	2,826.7	2,001.0	1,803.9	232.3	708.8	862.8
1977	2,958.6	2,066.6	1,883.8	253.9	731.4	898.5
1978	3,115.2	2,167.4	1,961.0	267.4	753.7	939.8
1979	3,192.4	2,212.6	2,004.4	266.5	766.6	971.2
1980	3,187.1	2,214.3	2,000.4	245.9	762.6	991.9
1981	3,248.8	2,248.6	2,024.2	250.8	764.4	1,009.0
1982	3,166.0	2,261.5	2,050.7	252.7	771.0	1,027.0
1983	3,277.7	2,334.6	2,145.9	283.6	800.7	1,061.7
1984	3,492.0	2,468.4	2,239.9	318.6	828.0	1,093.3
1985	3,571.0	2,508.9	2,313.0	345.0	846.9	1,121.0

Source: Bureau of Economic Analysis, U.S. Department of Commerce

Table VI-4
Percent Change in Major Economic Indicators (Constant dollars)

	Gross National Product	Disposable Personal Income	Personal Consumption Expenditures			
			Total	Durables	Non-durables	Services
1971	2.8%	3.6%	3.1%	9.7%	1.2%	3.3%
1972	5.0	4.0	5.4	12.4	3.9	5.0
1973	5.2	6.6	4.2	9.9	2.6	4.0
1974	−0.5	−1.0	−0.9	−7.0	−2.5	2.2
1975	−1.2	1.8	2.3	0.3	1.6	3.3
1976	4.9	3.6	5.4	13.0	4.8	4.0
1977	4.7	3.3	4.4	9.3	3.2	4.1
1978	5.3	4.9	4.1	5.3	3.0	4.6
1979	2.5	2.1	2.2	−0.3	1.7	3.3
1980	−0.2	0.1	−0.2	−7.7	−0.5	2.1
1981	1.9	1.5	1.2	2.0	0.2	1.7
1982	−2.5	0.6	1.3	0.8	0.9	1.8
1983	3.5	3.2	4.6	12.2	3.8	3.4
1984	6.5	5.7	4.4	12.3	3.4	3.0
1985	2.3	1.6	3.3	8.3	2.3	2.5

Source: Bureau of Economic Analysis, U.S. Department of Commerce

Table VI-5
Total Employment, 1970–1985

Year	Number Employed (000)
1970	78,678
1971[1]	79,367
1972[1]	82,153
1973	85,064
1974	86,794
1975	85,846
1976	88,752
1977	92,017
1978	96,048
1979	98,824
1980	99,303
1981	100,397
1982	99,526
1983	100,834
1984	105,005
1985	107,150

[1] Not strictly comparable with data for prior years

Source: Bureau of Labor Statistics, U.S. Department of Labor

Table VI-6
Unemployment Rate

Year	Average Annual Unemployment Rate
1970	5.0%
1971	5.9%
1972	5.6%
1973	4.8%
1974	5.6%
1975	8.5%
1976	7.7%
1977	7.0%
1978	6.0%
1979	5.8%
1980	7.1%
1981	7.6%
1982	9.7%
1983	9.6%
1984	7.5%
1985	7.2%

Source: Bureau of Labor Statistics, U.S. Department of Labor

Table VI-7
Percent of Women in the Labor Force

Year	Percent of All Women
1970	43.4
1971	43.4
1972	43.9
1973	44.8
1974	45.7
1975	46.4
1976	47.4
1977	48.5
1978	50.0
1979	51.0
1980	56.1
1981	52.2
1982	52.7
1983	53.0
1984	53.7
1985	54.5

Source: Bureau of Labor Statistics, U.S. Department of Labor